ECONOMIC AND RESOURCE MANAGEMENT ASPECTS OF THE COMMERCIAL USE OF FISH AND WILDLIFE RESOURCES IN BRITISH COLUMBIA

LEGISLATIVE LIBRARY
WITHDRAWN

Province of
British Columbia

Ministry of
Environment

104-05294/

ECONOMIC AND RESOURCE MANAGEMENT ASPECTS OF THE COMMERCIAL USE OF FISH AND WILDLIFE RESOURCES IN BRITISH COLUMBIA

prepared for:

Ministry of Environment
Fish and Wildlife Branch
Victoria, British Columbia

by

Canadian Resourcecon Limited
Quadra Economic Consultants Ltd.
Vancouver, British Columbia

June 1, 1979

TABLE OF CONTENTS

I INTRODUCTION AND SUMMARY OF FINDINGS 1

- 1.0 Introduction 1
- 2.0 Summary of Findings 5
  - 2.1 Non-Resident Hunters 5
  - 2.2 The Big Game Guiding Industry 5
  - 2.3 The Packing Industry 7
  - 2.4 Commercial Fresh Water Sports Fishing Operations 8

II THE NON-RESIDENT HUNTER 10

- 1.0 Trends in Non-Resident Hunting 10
  - 1.1 Regulatory Factors 10
  - 1.2 Participation Rate 13
- 2.0 Origin of Non-Resident Hunters 14
- 3.0 Regional Distribution of Non-Resident Hunters 14
- 4.0 Hunt Characteristics 17
- 5.0 Success Rates of Non-Resident Hunters 19
- 6.0 Non-Resident Hunter Opinion and Preferences 24
- 7.0 Non-Resident Hunters' Expenditures 33
- 8.0 Non-Resident Hunters Using Permits 37
- 9.0 Summary

III THE BIG GAME GUIDING INDUSTRY 42

- 1.0 Regulatory Framework 42
- 2.0 Industry Structure 47
  - 2.1 Number and Distribution of Big Game Guides 47
  - 2.2 Services Provided 49
  - 2.3 Hunting Clientele 51
  - 2.5 Size of Guiding Operations 54
  - 2.6 Importance of the Guiding Industry 59
- 3.0 Economics of Guiding 59
  - 3.1 Revenues 59
  - 3.2 Operating Costs 61
  - 3.3 Earnings 65
  - 3.4 Investment 67
  - 3.5 Extent of Canadian Ownership 70
- 4.0 Regional Economic Impact 71
- 5.0 Guide-Outfitters Certificates 73
- 6.0 Guide Opinions and Concerns 79
- 7.0 Assistant Guides 83
- 8.0 Summary 90

IV THE PACKING INDUSTRY 94

- 1.0 Regulatory Framework 95
- 2.0 Industry Structure 95
  - 2.1 Number and Distribution of Packing Operations 96
  - 2.2 Services Provided for Hunters 96
  - 2.3 Services for Non-Hunters 98
  - 2.4 Clientele 99
  - 2.5 Size of Operations 100
  - 2.6 Charactersitics of Packers 100
- 3.0 Economics of Packing 101
  - 3.1 Operating Revenues 102
  - 3.2 Operating Expenses 102
  - 3.3 Earnings 103
  - 3.4 Investment 104
  - 3.5 Regional Economic Impact 105
- 4.0 Concerns of the Packing Industry 105
- 5.0 Charter Airlines 109

V COMMERCIAL FRESH WATER SPORTS FISHING OPERATIONS 111

- 1.0 Introduction 111
- 2.0 Types of Services Provided 116
- 3.0 Clientele 119
- 4.0 Economics of Fish Camp Operations 122
  - 4.1 Revenues 122
  - 4.2 Operating Costs 124
  - 4.3 Earnings 127
  - 4.4 Investment 129
- 5.0 Regional Economic Impacts 133
- 6.0 Small Game and/or Angling Guides 134
- 7.0 Summary 143

VI POLICY APPLICATIONS 145

- 1.0 Internal Management Issues 146
- 2.0 External Management Issues 148
- 3.0 Non-Resident Licence Fees 149

APPENDIX A
Terms of Reference A-1

APPENDIX B
Data Collection and Analysis Methods B-1

APPENDIX C
Guided Resident Hunters C-1

APPENDIX D
Federal and Provincial Taxes Applicable to Non-Resident Hunters' Expenditures D-1

LIST OF TABLES

1 Summary of Non-Resident Hunter Activity in British Columbia, 1971-1978 12

2 Origin of Non-Resident Hunters in 1977 15

3 Regional Distribution of Non-Resident Hunters (Using Guides) 18

4 Time Spent Hunting By Non-Residents in 1977 20

5 Totals of Big Game Animals, By Species, Taken by Non-Resident Hunters During 1977-78 Season 21

6 Regional Distribution of Big Game Harvest and Hunter Success Rates of Non-Resident Hunters in 1977 23

7 Non-Resident Hunting Preferences: Big Game Species 25

8 Non-Resident Hunting Preferences: Trophy and/or Meat Hunting 26

9 Availability of Game in Comparison to Other Hunts 28

10 Quality of Hunt in Comparison to Other Hunts 29

11 Cost of This Hunt in Comparison to Other Hunts 30

12 Quality of Guiding Services in Comparison to Other Hunts 31

13 Total and Average Expenditures of Guided Non-Resident Hunters in 1977 34

14 Transportation and Other Expenditures of Non-Resident Hunters in 1977 36

15 Expenditures of Non-Residents under Permit in 1977 39

16 Total Expenditures of Non-Resident Hunters 1977-78 41

17 Summary of Guiding Industry Activities, 1968-78 45

18 Summary of Guided Non-Hunter Activity, 1978-79 53

19 Distribution of Guiding Operations by Number of Hunters Per Guide, 1978-79 55

20 Distribution of Guiding Operations by Number of Employees Per Operation, 1978-79 57

21 Guide Outfitters' Dependence on Guiding as a Source of Income in 1978-79 60

22 Average and Total Operating Expenses of Guide Outfitters in 1978-79 62

23 Earnings Retained by Guide Outfitters in 1978-79 66

24 Average and Total Investment in Guiding Businesses in 1978-79 68

25 Average and Total Investment in Guiding Businesses, 1974-1977 69

26 Proportion of Operating Costs Spent in Local Economy in 1978-79 72

27 Comparison of Certificated and Non-Certificated Guide Operations in 1978-79 75

28 Employment Created by the Guiding Industry For Assistant Guides in 1978-79 86

29 Social and Economic Characteristics of Assistant Guides, 1977-78 88

30 Assistant Guides Dependence on Guiding As A Source of Income, 1977-78 89

31 Types and Frequency of Obstacles Preventing Assistant Guides from Becoming Guide Outfitters 91

32 Summary of the Economics of the Guiding Industry in British Columbia, 1978-79 93

33 Provincial Distribution of Probable Commercial Sports Fishing Enterprises in 1978 114

34 Impact of Fish and Wildlife Branch Activities on Commercial Sport Fisheries Operations in 1978 118

35 Sale of Fishing Licences 1974 to 1978 120

36 Commercial Sports Fishing Operations Proportion of Income from Non-Resident Fishermen in 1978 121

37 Distribution of Commercial Sports Fishing Operations by Resource Management Region and by Proportion of Income From Fishermen 123

38 Total and Average Operating Costs of Fish Camp Operations in 1978 by Resource Management Region 126

39 Fish Camp Industry Earnings in 1978 128

40 Proportion of Income Received by Fish Camp Operations from their Operations in 1978 130

41 Total Investment in Facilities by Fish Camps in 1978 131

42 Existing Investment in Facilities by Fish Camps 1974 to 1977 132

43 Local versus Non-Local Spending of Commercial Fresh Water Sports Fishing Operations in British Columbia in 1978 135

44 Sale of Small Game and/or Angling Guide Licences, 1970-1979 137

45 Summary of Small Game and/or Angling Guide Activity in British Columbia in 1978 139

46 Total and Average Investments of Small Game and/or Angling Guides Who Operate Independently of Fish Camps, Resorts or Lodges 142

47 Comparison of Non-Resident Hunter Licencing Schemes Used in British Columbia in 1973/74 and 1974/75 151

LIST OF MAPS

Map 1 British Columbia Resource Management Regions 16

Map 2 British Columbia Tourist Regions 113

I

INTRODUCTION AND SUMMARY OF FINDINGS

1.0 INTRODUCTION

British Columbia's rich endowment of sports fish and wildlife species is important to the residents of the province in a number of ways. Most directly, they provide abundant opportunities for outdoor recreation - fishing, hunting, observation - and contribute to the quality of many other forms of outdoor recreation activity. In addition it is generally acknowledged that the province's fish and wildlife resources are important in attracting visitors to British Columbia. Fish and wildlife are perceived as an integral part of the "great outdoors" that draws visitors, as an important attraction in both provincial and national parks, or as the specific object of a fisherman's or hunter's attentions.

In each of these contexts fish and wildlife resources can be seen as contributing to the tourism and travel industry that has become so important in British Columbia. However, the "drawing power" of fish and wildlife resources cannot be isolated from the many other features which attract visitors. As a result it is not possible to determine how many visitors are attracted to the province by these resources each year, or what their total impact on the provincial economy may be. The true figure must remain embedded in the aggregate statistics, which for 1977 indicated some 4.5 million visitors to British Columbia spending approximately $715 million.

For a large number of businesses the impact of this fish and wildlife "drawn" tourist spending will be only incidental - a small, but welcome, addition to a travel or visitor-related business. There are a smaller number of businesses, however, for which the presence of visitors drawn specifically by fish and wildlife resources is vitally important. These include big game guides and outfitters, wildlife packers, fishing camps, and fish resort operators. While some of these businesses, notably big game guides and outfitters depend to a high degree on visitors drawn from outside the province, others may have just as high a dependency on visitors to their locale drawn from inside the province.

The genesis for the present study lies with the concerns of one group of British Columbians whose business interests are vitally dependent on wildlife resources - big game guides and outfitters. These people's livelihood is directly dependent on the exploitation of wildlife and fish stocks, and they stand to be affected by resource management decisions at every turn. Decisions in the field of general resource management regarding the overall abundance of wildlife directly affect the guide/outfitter's ability to conduct his business and both the quantity and quality of "product" offered to potential clients. And for any given stocks of fish or wildlife, decisions that regulate the manner in which guide/outfitters conduct their businesses, or decisions that affect the allocation of wildlife between the guide/outfitter's clients and the non-guided resident hunter, are also important.

Guide/outfitters have been concerned that their interests were not being adequately taken into account in resource management decisions, and that the kind of information that would reflect the economic and social significance of their businesses was not available. An early study dealing with the guiding industry in British Columbia* was felt to be badly dated, and no longer representative of an industry that had undergone considerable structural change in recent years. To meet these concerns the Fish and Wildlife Branch (at that time in the Ministry of Recreation and Conservation, now of the Department of Conservation, Ministry of Environment) commissioned the present study. The focus of the study was initially to be on guide/outfitter's operations, with a focus towards wildlife dependent businesses. This was extended, however, to include the operation of fish camps and fishing resorts in order to give a more thorough coverage to commercial interests in fish and wildlife resources, and because of the increasing interdependence of guide/outfitting operations on both fish and wildlife exploitation.

The primary objective of this study is to acquire information on the economic and social significance of fish camp and fish resort operations and guide/outfitter's enterprises. This information is required so that the effects of management and policy decisions both on the operators themselves and on the benefits that accrue to British Columbia from their operations, can be more clearly understood. In the course of the study a great deal of information has been acquired from such businesses and from their clients. The consultants have enjoyed the cooperation of individual operators and the full support of their trade groups and associations - in particular, the Western Guides and Outfitters Association, the Resident Wildlife and Tourist Association and the B.C. Interior Fish Camp Operators Association. This support and cooperation is gratefully acknowledged, and is reflected in the information presented in the report. It is hoped that this information will meet the concerns of the guide/outfitters and others insofar as it provides a comprehensive statement regarding the economic and social aspects of an important component of fish and wildlife utilization in British Columbia. The information should also be of assistance to the provincial resource management agencies - directly the Fish and Wildlife Branch, indirectly all management agencies whose activities affect fish and wildlife habitat - in developing policy that effectively serves the public interest.

---

* *Bowden, G. and P. Pearse, 1968. Non-Resident Big Game Hunting and the Guiding Industry in British Columbia, Study No. 2 for the Fish and Wildlife Branch.*

The report presents data separately for wildlife-dependent operations and those which are dependent on the sports fishery resource. What has emerged from the study, however, is that this distinction is losing its validity, for wildlife operations (guide/outfitters) are turning increasingly to the sports fish resources to extend their season of operation and increase the utilization of fixed capital investments. The same can be said for fish resorts and fish camp operations which are demonstrating a tendency to extend their accommodation services for cross-country skiers and other vacationers in the winter months for the same reasons. The data which reveal these and other patterns of operation are presented in Chapters II through V. Chapter II deals with the tourist revenues generated by non-resident hunters. Chapter III deals with the characteristics and importance of guide/outfitting operations while Chapter IV examines the role of the packing industry. Commercial fresh water sports fishing operations are reviewed in Chapter V. Chapter VI explores some of the potential impacts of changes in management policy on guide/outfitters and fish camp operations, as well as the regional economies and direct provincial government revenues and expenditures. The important findings of these Chapters are summarized briefly here.

2.0 SUMMARY OF FINDINGS

2.1 Non-Resident Hunters

During the 1977-78 hunting season some 3,956 non-residents were reported to have hunted within British Columbia, 3,748 of them hunted with licenced Guide Outfitters while 208 hunted with a relative under permit.

Total hunting effort by non-resident hunters amounted to about 36,850 user days of which almost 43% was concentrated in Resource Management Region 7, Omineca-Peace.

Total expenditures in British Columbia by non-resident hunters in 1977 amounted to over $9 million. Payments to Guide Outfitters accounted for $5.76 million while $1.22 million was spent on hunting licences. Non-residents incurred $0.71 million in transportation costs within B.C. and purchased another $1.37 million of other goods and services. Of this total, over 47% of these total expenditures were made by non-residents who hunted in the Omineca-Peace Resource Management Region.

2.2 The Big Game Guiding Industry

In 1978 there were 314 licenced Guide Outfitters in British Columbia. These guides provided services to about 3,800 non-resident hunters, 100 resident hunters and 4,500 fishermen and other recreationists. In exchange for their services, guides received total payments of $11.63 million. Of this total, approximately $6.25 million came from non-resident hunters,* with the remainder having come from resident hunters and non-hunting clientele. Guide Outfitters in the Omineca-Peace Region accounted for $6.11 million or 53% of the total income of the industry.

---

* *As per Chapter II, non-resident hunters reported paying $5.76 million to guides in 1977. The 1978 estimate was made by scaling up these observed costs using the consumer price index.*

In conducting their businesses, Guide Outfitters hired 1,665 people, of whom 890 were Assistant Guides. Labour costs for the industry amounted to $3.36 million, or about $2,020 per employee. This labour income is of great importance in particular parts of the province because 95% of the employees hired by each guide came from the region in which the guide operated. In addition, it was claimed that over half (54%) of those people employed in the industry would have been unemployed were it not for their guiding activities.

The local spending of guides to purchase goods and services necessary to operate their businesses is also of importance to regional economies. Operating costs (excluding labour) amounted to $4.14 million in 1978, and 94% of the goods and services required were purchased within the region. An additional $2.26 million* worth of goods and services were bought by non-resident hunters (over and above their guide costs) and these purchases further benefitted the regional economies.

To further improve their facilities, Guide Outfitters invested a total of $3.08 million in 1978. Much of this investment took the form of new buildings, camping equipment and aircraft. Similar investments over the previous four year period amounted to about $10.1 million. This represents an average investment of $42,000 per guide operation over the period from 1974 to 1978.

Of all the income received by the industry, only a small amount ($1.05 million) was retained by guides as their personal earnings from operating the business. Although this amounts to only $3,330 per guide, many guides had alternate sources of employment. In addition, because many guides live year-round at their camps, they have minimal living expenses and may not require large amounts of cash income to live comfortably.

---

* *This figure is based on a 1977 estimate of $2.08 million inflated by the consumer price index.*

A number of issues were considered to be of importance to continued success of the industry. Among these issues were the impact of increased access (roads), competing land uses (forestry) and predators (wolves). However, the prime concern of the industry was found to be the lack of recognition of guides' interests within Fish and Wildlife Branch practices and policies, and the impact of existing policies (specifically regarding quota systems and packers) on the industry.

2.3 The Packing Industry

As an alternative to hiring a guide, resident hunters can hire packers who offer similar services at a lower price. Packers cater mainly to resident hunters although some provide services to fishermen and other non-hunters. Not much information about the packing industry is available, however. Although 36% of all Guide Outfitters reported troubles with packers in 1978, specifically in Regions 5, 6 and 7, there is no comprehensive list of these operations available.

In terms of the economics of running a packing business, those packers who responded to the questionnaire indicated that their operating costs plus investments exceeded income. Thus, packers seem to be highly dependent upon alternative employment income in order to continue operation of their packing businesses. If the packing industry is to progress any further, greater security will be required in order for packers to develop their businesses, and, the status of the industry vis-a-vis wildlife management policies must be clarified.

2.4 Commercial Fresh Water Sports Fishing Operations

Although a fully comprehensive list of fishing camps and fish resort operators is not available, the survey determined that there were at least 320 business operations in British Columbia in 1978 that relied on anglers for more than 20% of their total annual incomes. Almost three-quarters of these operations were located in the Thompson-Okanagan and Cariboo Resource Management Regions.

The services offered by these operations were primarily accommodation plus boat rentals and sales of fishing tackle and bait. Some operations, however, offered guiding services and 47 fish camp operations were owned by small game and/or angling guides. Although the clientele of these operations were primarily fishermen, the majority of whom were non-British Columbians, some fish camps now operate year round and provide accommodation for ice fishermen, cross country skiers and hunters.

Fish camps reported total revenues of $8.45 million in 1978. Of this total it is estimated that $3.31 million came from non-resident fishermen while $3.02 million came from resident fishermen. The other $2.12 million was attributable to non-fishing clientele. Angling guides who worked independently of these fish camps reported total revenues of $0.11 million.

Fish camp operations tend to be very family oriented. Of the 905 employees in the industry, 345 employees were related to the camp owner/operator. Total labour costs for the industry amounted to $1.72 million, or about $1,900 per employee. This employment income is particularly important in some areas as it was reported that one-third of all employees would have been otherwise unemployed. About 85% of all labour requirements for the industry were filled by people from the region in which the camp operated.

The other costs required to keep fish camps in operation for the year totalled $4.54 million. Of this, one-third was used to purchase supplies while another $0.86 million went to repair and maintenance costs. Of the necessary goods and services required, the majority (86.5%) was purchased within the region.

The total earnings of the fish camp industry in 1978 were estimated to be $2.19 million or about $6,855 per camp. However, camp operators reported investing $2.77 million to further develop their operations. Over a third of this money was invested in buildings with another 30% being spent on vehicles. The remainder went toward new boats, docks and other facilities. This investment plus the $8.34 million invested in the period from 1974 to 1977 brought the total investment in fish camp operations to $11.11 million over the last five years. Investment by independent angling guides was reported to have been another $0.57 million. As expected, the majority of investment in fish camp facilities occurred in the Thompson-Okanagan and Cariboo Regions.

Although fish camp operations are not directly tied to the fisheries resource, the quality of the resource definitely affects the well being of the industry. Most camp operators (60%) felt that non-resident fishermen were satisfied with the quality of fishing in local areas. However, less than half of these camps felt that they have benefitted from attempts by the Fish and Wildlife Branch to improve fish stocks. Thus, there is a demand for additional spawning facilities and stocking programs to improve the fishing quality available to the tourist market.

II

THE NON-RESIDENT HUNTER

The big game resources of British Columbia are known throughout the world. Each year more than 4,000 non-residents hunt in British Columbia, coming mainly from the United States, with lesser numbers from some European countries and the rest of Canada. Although non-residents represent a small proportion (less than 3%) of all the hunters active in the province in any given year, their expenditures represent a major benefit to the province. By examining their expenditure patterns, a part of the commercial/ recreational importance of provincial wildlife resources can be determined.

1.0 TRENDS IN NON-RESIDENT HUNTING

In 1977, 4,324 non-resident hunting licences were purchased; 518 by Canadians from outside B.C. and 3,806 by Americans and Europeans. This number represents an increase of 8.5% from licence sales in 1976, but is significantly less than the 7,600 non-resident licences sold in the peak year of 1973 (see Table 1).

1.1 Regulatory Factors

There are a number of factors that determine non-resident hunter activity in any given year. The most significant factor controlling non-resident hunting is a regulation (introduced in 1926) which makes it compulsory for non-resident hunters to be accompanied by a licenced guide or provincial resident:

> Non-residents of British Columbia hunting Big Game must be accompanied by a licenced B.C. guide. On the completion of the hunt, non-residents must obtain a completed form

> of declaration from their guide. Failure to do so constitutes an offence on the part of the hunter and the guide. A non-resident of B.C. who is a resident of Canada may be accompanied by a Canadian resident of B.C. instead of a licenced B.C. guide provided the Canadian B.C. resident obtains a permit from Fish and Wildlife Branch, Parliament Buildings, Victoria.
>
> (B.C. Fish and Wildlife Branch, Hunting Regulations Synopsis, 1977/78, p. 7)

The availability of licenced guides and the cost of hiring guides then serve to limit the number of non-resident hunters.

The system of licencing non-resident hunters represents a second method of controlling numbers of hunters. In British Columbia, two different types of licencing structures have been used. Prior to 1974, non-resident hunters were required to buy a basic hunting licence plus game tags for those species they wished to hunt, and then pay a trophy fee only if they killed an animal during the season. This system meant that only those hunters actually taking animals were paying significant amounts to the province. Trophy fees were eliminated in 1974 and the cost of game tages (species licences) was increased so that all hunters (successful or not) now "pay" for the annual game harvest. The revised system has caused some marginal hunters, who refuse to pay a higher licence cost for just the chance of shooting an animal, to cease big game hunting in British Columbia. After the implementation of this new licencing system the number of non-resident hunters in B.C. has been observed to decrease.*

Also in 1974, the cost of a basic hunting licence for most non-residents was increased from $15.00 to $75.00 in order to generate additional revenues for the province. At the same time, Fish and Wildlife policy recognized that after British Columbians, other Canadians should receive preferential consideration

---

* *Other factors contributing to the recent decrease in non-resident hunting activity may include increasing guide fees and transportation costs.*

TABLE 1

SUMMARY OF NON-RESIDENT HUNTER ACTIVITY IN BRITISH COLUMBIA, 1971-1978

	1971-72	1972-73	1973-74	1974-75	1975-76	1976-77	1977-78	1978-79
Sales of Non-Resident Hunting Licences*	6820	7170	7602	4624	3699	3987	4324	4426
- Canadian	180	151	244	399	366	445	518	579
- Other	6640	7019	7358	4225	3333	3542	3806	3847
Non-Resident Hunters Reported Active**	5670		6110	4036	3433	3773	3956	****
- with Guide Outfitter	5528	6045	5914	3937	3275	3606	3748	****
- by permit	142	****	196	99	158	167	208	****
Participation Rate***	83.1%		80.4%	87.3%	92.8%	94.6%	91.5%	****

* *As reported in Summary of Revenue Derived from Sale of Various Licences, Collections, Etc.*

** *As reported in Summary of Guided Hunter Activity.*

*** *Proportion of non-residents buying licences who actually hunt.*

**** *Data for these years was not available.*

in the allocation of wildlife resources. Consequently, the cost of a hunting licence (excluding trophy fees/species licence) for non-resident Canadian hunters actually decreased from $15.00 to $7.00. Coincidentally, the purchase of hunting licences by Canadians has doubled since 1974 while purchases by non-resident hunters have decreased by almost 50% since that time.

The schedule of species licence costs for non-residents is summarized below:

Black Bear	$40.00
Cougar	$100.00
Caribou	$100.00
Deer	$50.00
Elk	$100.00
Grizzly Bear	$300.00
Moose	$100.00
Mountain Goat	$100.00
Mountain Sheep	$250.00
Wolf	$75.00

For each non-resident hunting licence sold in 1977 an additional $215 worth of species licences was purchased. The average cost to a Canadian hunter was then $223 while other non-residents paid $290 for hunting and species licences. This cost represented approximately 13% of the average cost of a hunting trip in 1977.

1.2 Participation Rate

Not all non-residents who purchase licences actually hunt. Prior to 1974 only about 80% of non-resident hunters who purchased licences were recorded as having hunted. With the higher hunting and species licence fees after 1974, participation rates for non-residents have reached 93%, probably because the marginal hunter can no longer afford to pay for licences he might use.

In 1977, when a total of 4,324 non-resident hunting licences were sold, 3,956 non-residents were reported to have hunted, 3,748 with Guide Outfitters and 208 with B.C. residents holding permits. Thus, the participation rate for 1977 was 91.5%. It is not known, however, whether the participation rate differs between Canadian hunters, U.S. hunters or hunters from other countries.

2.0 ORIGIN OF NON-RESIDENT HUNTERS

Of all non-resident hunters purchasing licences in 1977, the majority (79.6%) were from the United States (see Table 2). Hunters from the rest of Canada accounted for another 12% of licence sales while hunters from countries in Europe and other continents accounted for the remaining 8.4%.

Over half of the American hunters came from the west coast of the United States: Washington, Oregon and California. Some seventeen states, in addition to those noted above, each accounted for more than one percent of the total number of hunters from the United States. Only three states had no hunters visit British Columbia in 1977.

Of the non-resident hunters from countries other than Canada or the United States, the majority were from Germany. Hunters came from 15 different countries in Europe and represented 90% of the other non-resident category. Hunters from eleven other countries, including Australia, New Zealand, South Africa, Mexico, Iran, Japan and Brazil, accounted for the remaining 10% of other non-resident hunters. These hunters and the distances they had to travel attest to the international reputation and importance of British Columbia's wildlife resources.

3.0 REGIONAL DISTRIBUTION OF NON-RESIDENT HUNTERS

Non-residents are found in each of the seven Resource Management Regions in British Columbia (see Map 1). Most non-resident hunting is concentrated in the northern half of the province and particularly in Resource Management Region 7 (Omineca-Peace) where about 45% of all non-Canadian hunters are found. There seems to have been a northerly shift in hunting activity since 1966 when 40% of all non-resident hunters were noted to hunt in the southern part of the province. This shift northward is probably attributable to increased access to northern B.C., the development of the guiding

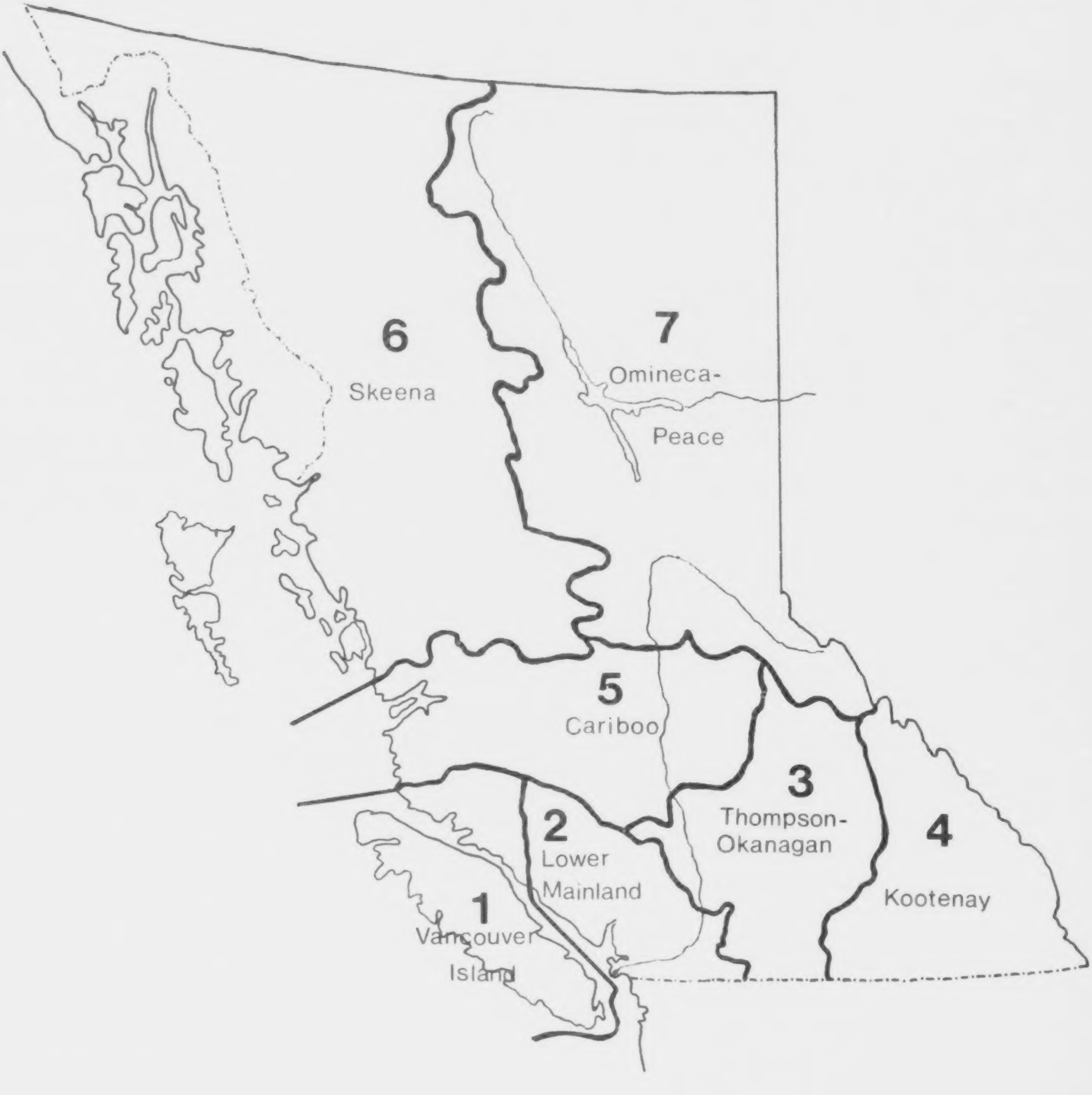
TABLE 2

ORIGIN OF NON-RESIDENT HUNTERS IN 1977

Origin	Percentage
Canadians - 518 hunters	
British Columbians*	25.8%
Prairie Provinces	50.3%
Ontario	11.6%
Quebec	6.3%
Maritimes	3.5%
Territories	2.5%
United States - 3,441 hunters	
Washington	23.4%
California	19.1%
Oregon	12.6%
Texas	4.5%
Pennsylvania	3.4%
Minnesota	2.8%
Other States	34.2%
Other - 365 hunters	
Germany	60.7%
Austria	10.2%
Mexico	4.7%
Sweden	4.4%
Other European Countries	15.4%
Other Countries	4.6%
Total Non-Resident Hunters - 4,324 hunters	
Canadian	12.0%
United States	79.6%
Europe and Others	8.4%

* *Canadians having resided in British Columbia for less than six months.*

British Columbia
Resource Management Regions


6
Skeena
7
Omineca-
Peace
5
Cariboo
3
Thompson-
Okanagan
4
Kootenay
2
Lower
Mainland
1
Vancouver
Island

industry in the north, and the declining hunting opportunities for trophy game in southern B.C.

The distribution of non-resident hunters among regions seems to differ significantly between Canadian, U.S. and other hunters (see Table 3). For instance, Canadian hunters have concentrated their hunting efforts in the Kootenay and Skeena Regions. This is probably attributable in part to the different big game species that Canadians are found to prefer. Few Canadian hunters hunted in the Omineca-Peace Region (Region 7), however almost half of all non-Canadian hunters were found in this Region in 1977.

4.0 HUNT CHARACTERISTICS

In coming to British Columbia, 96% of non-resident hunters came for the sole purpose of hunting. Almost half (45.1%) of all non-resident hunters chose to hunt in British Columbia because of the unique hunting experiences available. Another 18.8% were returning to the province based on previous hunting experiences. Of various other reasons for choosing B.C. to hunt, only proximity to the area, and the wilderness qualities of the province, each accounted for more than 5% of the total number of non-resident hunters.

Hunting trips require some degree of advance planning, both to arrange for a guide and the purchase of licences. For the 1977 hunting season, non-resident hunters hired guides up to 76 weeks in advance of the actual hunt. On average most hunts were booked about 29 weeks in advance. Species licences can be purchased several months before the hunt, but on average were purchased 6 weeks before the hunt commenced.

Most non-resident hunters came to British Columbia by private vehicle in 1977. In most cases (63.9% of all non-resident hunters) the vehicle was a private car or truck. A few hunters (3.2%) however, arrived by private plane. Commercial air carriers

TABLE 3

REGIONAL DISTRIBUTION OF NON-RESIDENT HUNTERS (USING GUIDES)

Resource Management Region*	*Origin of Non-Resident Hunters* Canada	United States	Other	Total Hunters
Lower Mainland	**	**	5.0%	0.5%
Thompson-Okanagan	19.8%	4.2%	**	5.4%
Kootenay	27.9%	8.0%	5.0%	9.7%
Cariboo	8.1%	23.7%	20.0%	21.8%
Skeena	27.0%	19.3%	25.0%	20.6%
Omineca-Peace	17.1%	44.8%	45.0%	42.1%

* *Data for Vancouver Island is not available.*
** *Data is incomplete.*

provided transportation for an additional 31.0% of all non-resident hunters.

The average length of a non-resident hunter's trip to British Columbia in 1977 was just over 13 days. The hunter actually hunted on 9 of these days, usually accompanied by an Assistant Guide (62% of guided non-resident hunters) rather than a Guide Outfitter, and, on average, fished for less than one day. In total, only 33.1% of all non-resident hunters were reported to have spent any time fishing. Among Resource Management Regions and nationality of hunters there is some degree of variation (see Table 4). Hunters from Europe and other countries tended to hunt and fish for more days than did other groups, probably to justify their trip. Hunting trips in the Cariboo Region tended to be almost two days shorter than the average trip while hunts in the Kootenays and Omineca-Peace Regions were longer than average. Fishing, as a component part of a hunting trip, was really only important for non-resident hunters in the Skeena Region (Region 6).

In total, some 36,850 days of non-resident hunting occurred in British Columbia in 1977. Of this total, over 60% occurred in the northern section of the province, in the Skeena and Omineca-Peace Regions.

5.0 SUCCESS RATES OF NON-RESIDENT HUNTERS

The success rates for non-resident hunters (including hunters under permit, see Section 8.0) have been calculated in Table 5 by comparing the number of animals taken to the number of species licences purchased. This rate takes no account of the time taken during the hunt and probably understates hunter success due to the fact that not all those purchasing licences actually hunted.

Estimated harvest information and hunter success rates for guided non-resident hunters in each Resource Management Region and for each big game species are shown in Table 6 . As calculated, over

TABLE 4

TIME SPENT HUNTING BY NON-RESIDENTS IN 1977

Resource Management Region*	Average Days Spent Hunting	Average Days Spent Fishing	Number of Non-Resident Hunters	Number of Hunter Days	Number of Angler Days
Lower Mainland	12.0	**	17	205	**
Thompson-Okanagan	9.4	0.1	201	1,895	20
Kootenay	10.5	0.6	364	3,830	230
Cariboo	7.4	0.9	818	6,060	760
Skeena	9.6	1.4	771	7,400	1,100
Omineca-Peace	10.1	0.8	1,577	15,960	1,310
Permit Hunters	7.2	0.9	208	1,500	200
Total	9.3	0.9	3,956	36,850	3,620
Canadians	8.2	0.9	475	3,890	420
United States	9.1	0.8	3,149	28,620	2,480
Other	13.1	2.2	332	4,340	720

** Data for Vancouver Island is unavailable.*

*** Data is incomplete.*

TABLE 5

TOTALS OF BIG GAME ANIMALS, BY SPECIES, TAKEN BY NON-RESIDENT HUNTERS DURING 1977-78 SEASONS

No. of Licences Sold	Species	No. of Animals Taken	% Success Rate
1081	Black Bear	257	24%
965	Caribou	427	44%
55	Cougar	47	85%
494	Deer	106	21%
428	Elk	180	42%
536	Grizzly Bear	131	24%
2837	Moose	1692	60%
838	Mountain Goat	455	54%
650	Mountain Sheep	325	50%
373	Wolf	39	10%

half the annual big game harvest by non-residents came from the Omineca-Peace Region where each hunter took 1.14 animals. This success rate is well above the provincial average of 0.94 animals per guided non-resident hunter. Hunter success rates for guided hunters in each Resource Management Region in 1977 are summarized below:

	Resource Management Region						
	Lower Mainland	Thompson Okanagan	Kootenay	Cariboo	Skeena	Omineca Peace	Total
Total Harvest	13	79	178	590	858	1,790	3,508
Total Hunters	17	201	364	818	771	1,577	3,748
Harvest per Hunter	0.76	0.39	0.49	0.72	1.11	1.14	0.94

Non-resident hunters under permit (208) harvested only 65 animals for a success rate of only 31%. This is substantially different from the success rates for guided non-resident hunters and may in part reflect the different preferences for game that non-resident hunters under permit seem to have (see section 8.0).

It should be mentioned here that the term hunter success has been used to describe only distribution of the harvest for 1977 among Regions and hunters. There is no consideration of the quality of the hunt in determining the success rate. Consequently, factors such as the species of animal taken, the sex and size of the animals taken and the type of game that hunters really want are not considered in this particular measure of hunting success. There is concern now by hunters and guides alike that due to the high cost of licences, trophy hunters will take any animal regardless of the size or species, in order to justify the cost of the hunt. Harvest statistics in this case will then overestimate the real "success" of the hunt.

TABLE 6

REGIONAL DISTRIBUTION OF BIG GAME HARVEST AND HUNTER SUCCESS RATES OF NON-RESIDENT HUNTERS IN 1977*

	Resource Management Region						
Species	Lower Mainland	Thompson Okanagan	Kootenay	Cariboo	Skeena	Omineca Peace	Province Total
Black Bear	13 (100%)	13 (25%)	53 (23.5%)	40 (15.0%)	53 (28.5%)	79 (15.8%)	251 (24%)
Grizzly Bear			14 (50.0%)	14 (50.0%)	15 (10.0%)	87 (30.0%)	130 (24%)
Caribou				8 (11.1%)	127 (46.9%)	289 (55.7%)	424 (48%)
Deer		23 (50%)	7 (7.1%)	38 (38.5%)	23 (100%)	7 (16.7%)	98 (28%)
Elk			76 (43.5%)	8 (33.3%)	8 (100%)	84 (57.9%)	176 (42%)
Moose		34 (66.7%)	8 (12.5%)	419 (66.7%)	377 (73.8%)	822 (76.6%)	1,660 (60%)
Mountain Goat		9 (50.0%)	9 (50.0%)	52 (66.7%)	157 (58.1%)	226 (60.5%)	453 (54%)
Mountain Sheep			11 (33.3%)	11 (25.0%)	98 (52.9%)	196 (42.9%)	316 (50%)
Total Animals	13	79	178	590	858	1,790	3,508
Proportion of Total Harvest	0.4%	2.3%	5.1%	16.8%	24.5%	51.0%	100%

---

* *The numbers shown indicate the number of animals (by species) harvested in each Resource Management Region. The number in brackets shows hunter success rates as calculated by comparing the number of animals harvested to the number of species licences purchased by hunters in that Region. Non-resident hunters under permit are not included in this table.*

6.0 NON-RESIDENT HUNTER OPINION AND PREFERENCES

As noted above, hunter success rates make no inferences about the quality of the hunt. The quality of a hunt is an individual's assessment of his own experiences and depends largely on his expectations and preferences in hunting. By reviewing hunter preferences and opinions, some of the quality parameters of big game hunting in British Columbia can be established.

One measure of quality relates to the kind of big game sought and the reasons for wanting that particular game species. In 1977 moose was the most commonly sought game species for non-resident hunters, with mountain sheep and grizzly bear as the next most important game species (see Table 7). Among Regions and hunter nationalities there was however, a great variation. Canadian hunters, for instance, thought that deer was a more important species than moose. Hunters from Europe and other continents rated bear, both grizzly and black, as the next most important species to moose.

Particular game species in specific areas attract different types of hunters. In the Kootenays (Region 4), elk attracted many non-resident hunters, many of whom reported elk to be the most important game species in the Region. Similarly, caribou and mountain goat were important in the Skeena and Omineca-Peace Regions. Where mountain sheep were not common, hunters preferred other game species, like bear and deer in the Kootenay and Cariboo Regions.

The majority of non-resident hunters were after both trophy and meat (see Table 8). Hunters after trophy animals represented over 40% of all non-resident hunters. Meat hunters constituted a very small proportion of non-resident hunters except in the Cariboo Region where there were almost as many meat hunters as trophy hunters in 1977.

TABLE 7

NON-RESIDENT HUNTING PREFERENCES: BIG GAME SPECIES

Resource Management Region	Most Important Big Game Species	Second Most Important Big Game Species	Third Most Important Big Game Species
Lower Mainland	Black Bear	*	*
Thompson-Okanagan	Moose	Mountain Sheep	Black Bear
Kootenay	Elk	Black Bear	Deer
Cariboo	Moose	Black Bear	Deer
Skeena	Moose	Mountain Sheep	Mountain Goat
Omineca-Peace	Moose	Mountain Sheep	Caribou
Provincial Average	Moose	Mountain Sheep	Grizzly Bear
Canadians	Deer	Moose	Mountain Sheep
Americans	Moose	Mountain Sheep	Caribou
Others	Moose	Grizzly Bear	Black Bear

* *Data is incomplete.*

TABLE 8

NON-RESIDENT HUNTING PREFERENCES:

TROPHY AND/OR MEAT HUNTING

Resource Management Region	Seeking Trophy (Percent)	Seeking Meat (Percent)	Seeking Both (Percent)
Lower Mainland	100		
Thompson-Okanagan	42.9	7.1	50.0
Kootenay	50.0	6.3	43.8
Cariboo	22.6	17.9	59.5
Skeena	46.7	18.7	34.6
Omineca-Peace	45.3	10.6	44.1
Provincial Average	40.3	15.0	44.7

In assessing the overall quality of their guided hunt in British Columbia in 1977, most non-residents agreed that their hunt was better than average. Only about 20% of non-resident hunters felt that their hunt was below average. This hunt quality information was consistent across the province and in aggregate, was rated as follows:

Quality of the Hunt	Percent Response
Excellent	46.7%
Good	25.3%
Average	7.7%
Fair	9.2%
Poor	11.1%
	100.0%

Furthermore, 73.4% of all non-resident hunters indicated that the quality of the hunt was up to their expectations.

Another way to determine hunt quality is by comparing one hunting trip to other hunts. Of all non-resident hunters in 1977, 82% had hunted elsewhere. These hunters were asked to rate their 1977 guided hunt in British Columbia to other hunts they had made, in terms of the availability of game, the quality of the hunt, the cost of the hunt and the quality of guiding services. Depending on the origin of the hunter and the Resource Management Region in which they hunted, there were tremendous variations in responses. The responses to these questions are summarized on Tables 9 to 12 and are discussed below.

Availability of Game It appears that within the province, game was more available to guided hunters in the north. This observation is consistent with the hunter success rates calculated earlier. Canadian hunters seemed more pleased with the availability of game than were hunters from the United States. In terms of European and other hunters, game availability in B.C. would appear to have been below average.

TABLE 9

AVAILABILITY OF GAME IN COMPARISON TO OTHER HUNTS

Resource Management Region*	Better	Same	Worse
Thompson-Okanagan	16.7%	16.7%	66.7%
Kootenay	39.3%	28.6%	32.1%
Cariboo	33.3%	35.1%	31.6%
Skeena	36.2%	37.9%	25.9%
Omineca-Peace	55.7%	27.9%	16.4%
Provincial Average	43.7%	31.0%	25.3%
Canadian	68.8%	18.8%	12.4%
United States	43.8%	32.1%	24.1%
Other	28.6%	35.7%	35.7%

* *Data for Vancouver Island and Lower Mainland is incomplete or unavailable.*

TABLE 10

QUALITY OF THIS HUNT IN COMPARISON TO OTHER HUNTS

Resource Management Region*	Better	Same	Worse
Thompson-Okanagan	25.0%	41.7%	33.3%
Kootenay	40.7%	40.7%	18.6%
Cariboo	32.8%	39.7%	27.6%
Skeena	39.3%	42.9%	17.9%
Omineca-Peace	46.2%	33.6%	20.2%
Provincial Average	40.4%	37.9%	21.7%
Canadian	60.0%	40.0%	0.0%
United States	41.0%	36.9%	22.1%
Other	14.3%	57.1%	28.6%

* *Data for Vancouver Island and Lower Mainland is incomplete or unavailable.*

TABLE 11

COST OF THIS HUNT IN COMPARISON TO OTHER HUNTS

Resource Management Region*	Better	Same	Worse
Thompson-Okanagan	41.7%	50.0%	8.3%
Kootenay	21.4%	42.9%	35.7%
Cariboo	14.5%	43.6%	41.8%
Skeena	12.7%	50.9%	36.4%
Omineca-Peace	12.6%	42.0%	45.4%
Provincial Average	15.2%	44.6%	40.2%
Canadian	20.0%	66.7%	13.3%
United States	15.3%	44.4%	40.3%
Other	14.3%	42.9%	42.9%

* *Data for Vancouver Island and Lower Mainland is incomplete or unavailable.*

TABLE 12

QUALITY OF GUIDING SERVICES IN COMPARISON TO OTHER HUNTS

Resource Management Region*	Better	Same	Worse
Thompson-Okanagan	30.0%	30.0%	40.0%
Kootenay	46.4%	39.3%	14.3%
Cariboo	48.1%	25.9%	25.9%
Skeena	45.5%	27.3%	27.3%
Omineca-Peace	53.8%	23.9%	22.2%
Provincial Average	49.2%	26.9%	23.9%
Canadian	64.3%	35.7%	0.0%
United States	49.0%	26.6%	24.3%
Other	30.8%	46.2%	23.0%

* *Data for Vancouver Island and Lower Mainland is incomplete or unavailable.*

Quality of the Hunt Again, the general quality of the hunt tended to improve the further north the hunter went. As an exception, hunting in the Kootenays Region was noted to be above the provincial average. The highest quality hunting was noted in the Omineca-Peace Region, while the Thompson-Okanagan Region was rated to have the poorest hunting. Canadian and U.S. hunters generally concluded that the quality of the hunt was better than average but other hunters felt that their hunting in B.C. in 1977 was only average.

Cost of the Hunt In general, the cost of non-resident hunting in B.C. was thought to be about the same or slightly higher than other hunts. Notable exceptions to this statement were in Region 3 (Thompson-Okanagan), where the cost was lower than anywhere else but quality was judged to have been considerably worse, and for Canadian hunters who perceived the cost of hunting in B.C. to be slightly lower than average.

Quality of Guiding Services Overall almost half of the non-residents hunters who had hunted elsewhere concluded that guiding services in B.C. in 1977 were better than on their other hunts. Only the majority of other (European) hunters considered the quality of guiding services to have been average in comparison to other hunts.

In 1977, non-resident hunters spent $5.7 million in British Columbia. The benefits of these expenditures were spread throughout the province according to the different types of costs that non-resident hunters faced.

7.0 NON-RESIDENT HUNTERS' EXPENDITURES

In 1977 non-resident hunters spent $9.0 million in British Columbia. The benefits of these expenditures were spread throughout the province according to the different types of costs that non-resident hunters faced. First, it is necessary for all prospective hunters to purchase the appropriate licences in order to be able to hunt big game. Payments for non-resident hunting licences in 1977 amounted to $1,220,591 (see Table 16). (This figure includes licences purchased by people who did not actually hunt.) The money from licence sales goes into the general revenues of British Columbia and represents an income benefit to the province.

A second prerequisite for non-residents to be able to hunt, necessitates that they hire a licenced big game guide. Fees paid to guides amounted to $5.8 million (see Table 13) and represented the largest expenditure (65%) of non-residents on their hunt. On average, non-residents each paid $1,536 for guide services. There was, however, a tremendous variation in average guide costs throughout the province, ranging from $802 per hunter in the Cariboo (or $108 per hunter day) to $1,861 in the Omineca-Peace Region ($184 per hunter day). Other hunters paid an average of $2,376 in guide fees (or $181 per day). This average cost per hunter day is 60% higher than the guide fees paid by Canadian hunters ($923 or $113 per day). Hunters from the United States each paid $1462 to guides or about $161 per day.

There are three types of payments made to big game guides. First, there is the standard fee that guides require for their services. Second, guides receive tips and bonuses. A third type of payment is sometimes required by guides, but usually only in Resource Management Regions 6 and 7. In those Regions some guides require that hunters pay an additional fee ranging from $100 to $1200 if a big game animal is actually killed. This premium was paid primarily for grizzly bear but is also required in some cases for black bear, moose, mountain goat and mountain sheep.

TABLE 13

TOTAL AND AVERAGE EXPENDITURES OF GUIDED NON-RESIDENT HUNTERS IN 1977

Resource Management Region*	Hunting Licences	Payments to Guide	Transportation Costs in B.C.	Other Expenditures (Accommodation, food, etc.)	Total Expenditures	Percent of of Total Provincial Expenditures
Lower Mainland	$2,295 ($135)	$14,450 ($850)	$2,210 ($130)	$6,800 ($400)	$25,755 ($1,515)	0.3%
Thompson-Okanagan	$58,895 ($293)	$222,505 ($1,107)	$14,470 ($72)	$40,805 ($203)	$336,675 ($1,675)	3.8%
Kootenays	$95,370 ($262)	$516,880 ($1,420)	$50,230 ($138)	$112,840 ($310)	$775,320 ($2,130)	8.7%
Cariboo	$168,500 ($206)	$656,035 ($802)	$89,160 ($109)	$171,780 ($210)	$1,085,475 ($1,327)	12.2%
Skeena	$286,810 ($372)	$1,411,700 ($1,831)	$204,315 ($265)	$390,125 ($506)	$2,292,950 ($2,974)	25.7%
Omineca-Peace	$566,140 ($359)	$2,934,800 ($1,861)	$307,515 ($195)	$586,645 ($372)	$4,395,100 ($2,787)	49.3%
Provincial Total	$1,178,010	$5,756,370	$667,900	$1,308,995	$8,911,275	100.0%
Percent of Total	13.2%	64.6%	7.5%	14.7%	100.0%	

* *Data for Vancouver Island is unavailable.*

The third type of expense a hunter faces is the cost of transportation to the hunt from his residence. As most non-resident hunters (64%) drove to British Columbia in a private vehicle, transportation costs were limited to gas and oil, vehicle rentals and repairs. Another 31% of non-residents came to B.C. via commercial airlines and then used rental vehicles or smaller airlines to travel within B.C. Actual travel costs for non-residents were probably much higher than the $0.67 million shown in Table 13. As we are interested only in the economic benefits of non-resident hunters in British Columbia, travel costs outside the province have been ignored. As would be expected, travel costs were higher for those hunters who travelled to the northern part of the province. And, other hunters had travel costs ($525 per hunter) that were more than double the travel costs of non-residents from the United States and Canada. Travel costs for Canadian hunters ($174) were found to be higher than the travel costs of hunters from the United States ($160), probably because more Canadians chose to fly to British Columbia and then had to rent vehicles to travel within the province.

The fourth type of cost incurred by non-resident hunters involves any expenditures on food, alcohol or lodging while on the trip. Hunters may also spend money on taxidermy work and/or the purchase of any special equipment. These incidental expenditures accumulated to $1.3 million and accounted for 14.7% of all non-resident hunters' expenses in 1977. Again, there were major variations among regions, incidental costs being higher in northern B.C. and lowest in the Cariboo and Lower Mainland Regions. Other hunters spent the greatest amount on food, lodging, etc. Their expenditures averaged $1,209 per hunter. Canadian and American hunters spent much less, $267 and $300 per hunter respectively.

A further breakdown of transportation and other expenditures is included as Table 14. Of the $2.1 million spent by non-residents, the largest share (18.5%) was used for taxidermy services. Another 16.7% was used to purchase food and 14.8% went to bus, rail and airline services. Approximately 12.7% went for hotel and motel services while only 4.6% went to rent vehicles.

TABLE 14

TRANSPORTATION AND OTHER EXPENDITURES OF NON-RESIDENT HUNTERS IN 1977*

	Origin of Hunter			
Expenditure	Canada	U.S.A.	Other	Total
Transportation				
Fares	$32,760	$205,850	$69,545	$308,155
Gas and Oil	$23,055	$192,945	$49,585	$265,585
Vehicle Rental	$18,700	$33,655	$43,545	$95,900
Vehicle Repair	$2,480	$36,980	-	$39,460
Subtotal	$76,995	$469,430	$162,675	$709,100
Other Costs				
Food	$33,870	$248,985	$64,475	$347,330
Alcohol	$10,675	$58,570	$20,720	$89,965
Lodging	$14,860	$194,575	$54,350	$263,785
Taxidermy	$26,960	$208,360	$150,490	$385,810
Other	$31,565	$169,795	$83,785	$285,145
Subtotal	$117,930	$880,285	$373,820	$1,372,035
TOTAL	$194,925	$1,349,715	$536,495	$2,081,135

* *Includes non-residents hunting under permit.*

The province benefits from non-resident expenditures on transportation and other items in a number of ways. Merchants, taxidermists and others involved in the provision of goods and services directly enjoy both employment and income benefits as a result of non-resident spending. Other people in the province indirectly benefit because various taxes levied on specific goods and services act to redistribute income benefits by adding to the province's general accounts. As they apply to hunters' expenditures, the more important of these federal and provincial taxes are outlined in Appendix D. Given this tax information, it is possible to calculate the amount of non-resident hunters' expenditures that is redistributed via taxes. These amounts are summarized below:

Expenditures On	Federal Taxes	Provincial Taxes	Revenues to B.C. Businessmen
Transportation	$91,120	$61,110	$556,890
Other	$56,585	$36,770	$1,278,680
Total	$147,705	$97,880	$1,835,550

8.0 NON-RESIDENT HUNTERS USING PERMITS

Instead of hiring guides some 208 non-residents hunted with relatives who had acquired permits from the Fish and Wildlife Branch. Altogether, 165 permits were issued, so that 1.26 non-resident hunters accompanied each permit holder.

Of the 208 non-residents under permit about 80 were from the United States, with the remainder coming from other provinces in Canada. Their hunting preferences were quite different from guided non-resident hunters. Primarily non-resident hunters were hunting for meat (61%) with only 23% hunting for trophies. As expected moose was the most popular species, with deer second, and mountain goat third.

Another feature that differentiates non-residents under permit from other non-resident hunters is that fewer species tags were bought by hunters under permit. Under permit non-residents bought an average of 1.38 species licences in comparison to 1.94 species licences for guided hunters. Hunter success rates were very different. Success rates for non-resident hunters using permits in 1977 were:

Caribou	9.4%
Deer	10.0%
Elk	0.0%
Moose	28.6%
Mountain Goat	6.3%
Mountain Sheep	56.3%

In most cases success rates were well below the corresponding rates for guided non-residents. Despite poorer success, non-resident hunters under permit made the following comparisons to their other hunting experiences.

Availability of Game 66% of hunters under permit felt that this hunt was better than other hunts while 33% felt that it was about the same.

Quality of the Hunt 50% responded that their hunt was better than usual and 50% felt that the quality of the hunt was about the same.

Cost of the Hunt Despite the fact that non-resident hunters under permit paid no guide fees, 17% felt that the cost of this hunt was higher than usual while 17% felt that the cost of the hunt was lower.

Overall, 46% of the non-residents hunting under permit rated the quality of their hunt as excellent while the remaining 54% rated their hunt as good.

As non-residents under permit pay no guide fees and because they bought fewer species tags than guided non-resident hunters, the average total cost of a hunt was considerably less than for other

TABLE 15

EXPENDITURES OF NON-RESIDENTS UNDER PERMIT IN 1977

Expenditure	Average Cost	Total Cost
Licence Cost	$41.21	$8,570
Species Licence Cost	$125.00	$26,000
Subtotal	$166.21	$34,570
Travel		
Fares	$54.00	$11,230
Gas and Oil	$55.00	$11,440
Vehicle Rental	$85.71	$17,830
Vehicle Repair	$3.36	$700
Subtotal	$198.07	$41,200
Food, Accommodation and Other Expenses	$303.07	$63,040
TOTAL EXPENDITURES	$667.35	$138,840

non-residents. Their average expenditures on food, lodging, travel and other expenses were, however, almost the same as for guided non-residents. Total expenditures by non-resident hunters under permit are summarized in Table 15.

9.0 SUMMARY

During the 1977-78 hunting season some 3,956 non-residents were reported to have hunted within British Columbia, 3,748 of them hunted with licenced Guide Outfitters, while 208 hunted with a relative under permit.

Total hunting effort by non-resident hunters amounted to about 36,850 user days of which almost 43% was concentrated in Resource Management Region 7, Omineca-Peace.

Total expenditures in British Columbia by non-resident hunters in 1977 amounted to over $9 million (see Table 16). Payments to Guide Outfitters accounted for $5.76 million, while $1.22 million was spent on hunting licences. Non-residents incurred $0.71 million in transportation costs within B.C. and purchased another $1.37 million of goods and services. Of this total, over 47% of these total expenditures were made by non-residents who hunted in the Omineca-Peace Management Region.

TABLE 16

TOTAL EXPENDITURES OF NON-RESIDENT HUNTERS, 1977-78

Hunter Category	Licence Costs	Payments to Guide	Transportation Costs in B.C.	Other Expenditures (Accommodation, food etc.)	Total Expenditures
Guided Non-Resident Hunters					
Total	$1,178,175	$5,756,370	$667,300	$1,308,995	$8,911,275
Average	$314	$1,536	$178	$349	$2,377
Non-Residents Under Permit					
Total	$34,570	-	$41,200	$63,040	$138,840
Average	$165	-	$198	$303	$666
Total Non-Resident Hunters					
Total	$1,220,591*	$5,756,370	$709,100	$1,372,035	$9,058,096
Average	$309	$1,455	$179	$347	$2,290

* *Includes licences sold to non-residents who did not hunt.*

III

THE BIG GAME GUIDING INDUSTRY

To meet the changing demands of non-resident hunters for hunting opportunities in British Columbia, a number of service industries have evolved. The most important of these is the big game guiding industry. Since 1913, when the first guide licence was issued, the industry has expanded northward throughout B.C., one step ahead of access roads and resource development projects. Catering to the needs of both non-resident and resident big game hunters, the guiding industry grew to employ 540 guides and bring in $2.2 million in guide fees in 1966. Since 1966, however, the number of both active guides and non-resident hunters has decreased considerably, suggesting that the guiding industry may be in decline. Closer investigation of the industry would suggest that rather than being in decline, the guiding industry is becoming more concentrated and is diversifying into a year round tourism industry. The ultimate success of this industry depends now upon the effect that new access and resource development will have upon the province's scenic and wildlife resources, and the framework of wildlife management policy and practice in which the industry must operate.

1.0 REGULATORY FRAMEWORK

The present structure of the guiding industry is to a large extent governed by the regulatory structure which has evolved over the last 50 years. Non-resident hunters were first required by law to be accompanied by a licenced guide or provincial resident in 1926. Since then, the existence of the guiding industry has been ensured by law and by the continued demand for hunting opportunities by non-residents. Subsequent changes in guiding laws acted to give the industry its present form. In 1945 a revision of guiding regulations prescribed various classifications of guides. More importantly, however, the new regulations recognized that guides and outfitters should be given certain territorial rights.

Over the following twenty-five years, regulations remained basically unchanged. Individual guiding territories were identified. In some cases guides were recognized as having distinct territories. In other cases, territories overlapped or were shared by a number of guides (guide blocks). These arrangements prevented intense competition between guides in areas of abundant game populations. Also, the geographic restrictions of guiding territories served to limit somewhat the number of guides and non-residents in the province.

The last major change in guiding regulations occurred in 1969. Two classes of big game guides were created:

> *Guide Outfitter*
>
> A person 19 years of age or over MAY be entitled to be licenced as a Guide Outfitter if he is a Canadian citizen, resident of the Province and who has been a licenced big game guide for a minimum of two years. The licence shall authorize the holder to guide a person to hunt species of game and to angle for fish in the non-tidal waters only for the species and within the area set forth by the issuer of the licence.
>
> *Assistant Guide*
>
> A person 18 years of age or over who is employed by a licenced Guide Outfitter MAY be entitled to be licenced as an Assistant Guide if he is a Canadian citizen. The licence shall authorize the holder to guide a person to hunt species of game and to angle for fish in the non-tidal waters only within the area allotted to that Guide Outfitter.

In addition, the concept of exclusive guiding rights in specified territories was developed. Guide Outfitter's Certificates, when issued, granted the holder monopoly guiding rights in a specified area for a period of up to 15 years. These Certificates are transferable upon approval of the Director of the Fish and Wildlife Branch and are considered to be a part of a Guide Outfitter's estate in the event of his death. Those guides who previously guided in a recognized area that neither overlapped nor was shared with other guides were invited to apply for a Guide Outfitter's Certificate. Where guiding territories overlapped, as in guide blocks, exclusive Guide Outfitter's Certificates were granted only when new boundaries that eliminated these overlaps were agreed upon by the guides in the particular guide block. The first such Certificate was granted in 1970 and as this report is written, some 203 Certificates have been granted.

Another change in regulations which affected the guiding industry occurred in 1976. Prior to that time, there were no public liability insurance requirements for guides and the regulations were amended in 1976 to require that to qualify for a Guide Outfitter's Licence, each prospective guide must hold not less than $500,000 in public liability insurance. The annual premiums for this insurance may amount to about $500, depending on the operation. This additional fixed cost probably led some marginal Guide Outfitters (those who only guide one or two persons per year) to give up their guiding operations.

In addition to the regulations discussed above, there are various practices and policies of the Fish and Wildlife Branch which affect the structure and stability of the guiding industry. In particular, any regulation of the number of non-resident hunters (through licence fees for instance), or the availability of game (quotas) may cause major impacts on the guiding industry. Following introduction of the new system of hunting licences and costs in 1974, the number of non-resident hunters (guiding clients) declined, with subsequent declines in the number of guides, fewer clients per guide and fewer Assistant Guides per guiding operation (see Table 17). Since implementation of the new licencing system, the number of hunter clients and Assistant Guides per Guide

TABLE 17

SUMMARY OF GUIDING INDUSTRY ACTIVITIES, 1968-78

Year	Number of Active Guide-Outfitters	Number of Active Assistant Guides	Number of Assistants per Guide Outfitter	*Number of Guided Hunters*		Number of Hunters Per Guide Outfitter
				Resident Hunters	Non-Resident Hunters	
1968	698	827	1.18	204	6,402	9.5
1969	652	874	1.34	190	6,518	10.3
1970	585	861	1.47	172	6,548	11.5
1971	450	842	1.87	156	5,528	12.6
1972	428	847	1.98	98	6,045	14.4
1973	399	958	2.40	89	5,914	15.0
1974	388*	808	2.08	84	3,937*	10.4
1975	370	754	2.04	127	2,375	9.2
1976	358	857	2.39	107	3,606	10.4
1977	303	851	2.81	80	3,748	12.6

* *The schedule and system of licence fees was revised in 1974.*

Outfitter has slowly increased back to levels comparable to the period just before revision of the hunter licencing practices. This trend would then suggest that regulation of the "market" for the guiding industry has in the long run, resulted in more clients for the reduced number of guiding businesses still in operation.

In addition to regulations affecting the industry directly and indirectly (through measures determining non-resident hunters' demands), the government can contol the availability of the "product" (the wildlife resource). Where over-harvesting of certain big game species in particular areas was imminent or to be avoided, the Fish and Wildlife Branch has undertaken various management strategies to control the annual game harvest. Three main types of strategies have been employed. The usual approaches have involved either specifying only those animals which can be legally harvested in terms of their age and/or sex characteristics, or by closing and shortening hunting seasons in particular areas. The third type of control was first used in British Columbia in 1976 to further reduce harvests of particular game populations (primarily mountain sheep) and is based on the establishment of quotas for management units and/or guiding territories. These controls are applied when necessary to meet management objectives.

The impact of quota systems on the guiding industry has varied considerably. The immediate effect was a reduction in hunter clientele for those guides who had historically been harvesting more game animals than the new quotas would allow. There was also some fear that quotas might cause a reduction in the value of the guide's Certificate or business. This situation does not seem to have occurred. Instead, quotas have delineated the availability of a scarce commodity - hunting opportunities for particular animal species. As non-resident hunter demand for these species has not decreased, the value of animals taken under quotas has increased. Some guides have acknowledged raising their fees for species under quota in order to take advantage of this situation. Further application of quotas may create similar types of costs and benefits for guides. However, competition with resident hunters for these game species may erode the long term effectiveness of a quota system if applied only to non-resident hunters (and consequently guides).

2.0 INDUSTRY STRUCTURE

2.1 Number and Distribution of Big Game Guides

Until Guide Outfitters submit to the Fish and Wildlife Branch, a summary of their guiding activities for the 1978-79 hunting season, the number of guides who actually operated during the season cannot be established Prior to the hunting season the Ministry of Recreation and Conservation* published a document entitled Guide Outfitters in British Columbia 1978, which listed 324 Guide Outfitters. However, not all of these guides purchased licences in 1978, and there were some new additions to the industry. Altogether about 320 licences were actually sold, but in some cases both parties involved in the sale of a guiding business purchased licences. After reviewing these licences it is likely that 314 Guide Outfitters could have operated in 1978. The analysis of the guiding industry has been completed on the basis of this number.

The number and distribution of Guide-Outfitters in 1978 is summarized below on the basis of geographical location and type of tenure:

---

* *Now the Ministry of the Environment.*

Resource Management Region	*Number of Guide-Outfitters*		
	Certificated	Non-Certificated	Total
Vancouver Island	2	3	5
Lower Mainland	0	3	3
Thompson-Okanagan	4	20	24
Kootenays	28	14	42
Cariboo	41	46	87
Skeena	38	22	60
Omineca-Peace	65	28	93
Provincial Total	178	136	314

Of these, not all were active. According to the annual Summary of Guided Hunter Activity* about 97% of all guides who purchased licences actually operated their guiding businesses in that year. Non-active guides purchased Guide Outfitter's Licences for a variety of reasons. Some purchased a licence assuming that they may operate in that year depending on alternative employment and/or other factors. On the likelihood that they may guide again in the future, others purchased licences to keep their future options open. Some certificated guides also purchased a licence so that they could maintain ownership of a certificated area even if they did not actually operate their business.**

Although over half of the Guide Outfitters with Certificates are found in northern B.C., the Omineca-Peace and Kootenay Resource Management Regions had the highest concentration of Certificates per number of guides. To date 203 certificated guiding areas have been created, of which 178 are owned by guides who purchased licences in 1978. Of the remaining Certificates, two are unowned, five have been cancelled (two more are pending cancellation), and six have been combined with other certificated areas. The remaining twelve Certificates are held by persons who did not purchase a Guide Outfitter's Licence in 1978 but who are probably in the process of selling their total guiding business (including Certificate).

---

* *Fish and Wildlife Branch, Victoria*

** *Regulation 25 under the Wildlife Act states:*
"Failure on the part of a Guide Outfitter to renew his licence for a period of more than one year shall result in cancellation of his Guide-Outfitter's Certificate unless otherwise permitted by the Director in writing."
(B.C. Reg. No. 229/73, Order in Council No. 2386)

2.2 Services Provided

In addition to guiding services most guides offer various combinations of services. Most (69%) offered transportation to and from the hunting camp in addition to meals and accommodation. Others (30%) provided only meals and accommodation during the guided hunt. Other combinations of services were offered by other guides; these included transportation and accommodation (no meals) and transportation and meals (no accommodation). The cost of these services ranged from $40 to $300 per day, $300 to $2,500 per week. The average guide fee charged in 1978 was about $172 per day.

Throughout the province there is some variation in the big game species available for hunting and not all guides are allowed to guide for all species. The number of guides allowed to guide for specific species is summarized below:

Black Bear	307	(97.7%)
Moose	290	(92.5%)
Grizzly Bear	266	(84.8%)
Wolf	240	(76.5%)
Mule Deer	231	(73.5%)
Mountain Goat	193	(61.4%)
Caribou	150	(47.8%)
Cougar	110	(34.9%)
White-tailed Deer	83	(26.5%)
Thin Horn Sheep	81	(25.8%)
Elk	57	(18.2%)
Big Horn Sheep	33	(10.6%)

In some cases, the number of animals of a particular species (including caribou, sheep, goat and grizzly bear) that can be harvested is restricted by a quota.

2.3 Hunting Clientele

Most of the hunters hiring guides are non-residents, most of whom are from the United States. Hunters from the rest of Canada constituted only 12% of all guided hunters in 1978. Most characteristics of the non-resident hunter have been discussed in Chapter II of this report. However, various aspects of the guided hunt can be best interpreted by the guide.

In observing the intensity of guided hunter activity over time, many guides (35%) have noted a decrease in the number of non-Canadian hunters over the last four years. On the other hand, a lesser number of guides (27%) noted an increase in the number of non-Canadian hunters. Licence sales, however, suggest an overall decrease in the number of non-Canadian hunters in British Columbia. Of various reasons given for fewer non-Canadian hunters, the carrying capacity of a guide's territory was of primary importance (reported by 28% of guides). Cost was also a major factor (23%) although the impact of foreign exchange rates has negated some of the increase in hunting costs. Closed and/or changed hunting seasons and the effect of quotas were noted as important factors by 14% of guides. Problems with logging and access roads were reported by another 7% of guides. Reasons for increased non-Canadian hunting activity include improved services and publicity (18% of guides) and greater demands by non-Canadian hunters (4% of guides).

In contrast to non-Canadian hunters, the number of Canadian hunters using guides is increasing. Half of all guides who have accommodated Canadian hunters in recent years noted an increase in business while the other half noted no change. Changing costs were suggested to have been of great importance. Other factors included greater demands by Canadians and the effects of advertising.

Non-residents are not the only hunters to hire guiding services. Each year a small number of British Columbian hunters hire guides. Over the past few years, between 80 and 100 residents have hired guides annually; this number represents less than 0.1% of all British Columbians who purchase hunting licences. While non-residents must hire guides in order to hunt, the major reasons why residents chose to hire guides included gaining access to otherwise isolated areas of the province and improving their chances of actually shooting an animal.

Eighty residents were reported to have hired guides in 1977. The corresponding number for 1978 is not known as yet, but will be available once the annual guide reports are completed. In 1977, resident hunters represented only 2% of all hunters using guides.

Guide-Outfitters have indicated that the number of British Columbians hiring guides has generally been increasing in recent years. In isolated areas where access is improving, the number of residents reported to have hired guides has decreased (noted by 20% of guides). Another 50% of guides indicated that the demand by resident hunters for guiding services has remained about the same.

The hunt characteristics of resident hunters using guides differ quite markedly from guided non-resident hunts. Some of the more important difference are examined in Appendix C. This Appendix discusses the characteristics and importance of resident hunters in the same way that Chapter II examines non-resident hunters.

2.4 Non-Hunting Clientele

Many guiding operations work beyond the hunting season and offer various services to non-hunters. Most operations (94%) remain inactive from December until April or May, at which time some camps open for spring grizzly hunts. By July, all but 9% of all camps are in operation, offering guiding services to fishermen, or other outdoor experiences such as hiking expeditions into wilderness areas to the general public. Guided hunter operations commence in August and by December most are again closed for the winter.

A greater proportion of certificated guides offer services to non-hunters than do non-certificated guides, particularly in Regions 6 (Skeena) and 7 (Omineca-Peace).

NUMBER OF GUIDES OFFERING SERVICES TO NON-HUNTERS

Resource Management Region	Certificated	Non-Certificated	Total
Vancouver Island	*	3 (100%)	3 (100%)
Lower Mainland	-	1 (33%)	1 (33%)
Thompson-Okanagan	4 (100%)	7 (33%)	11 (46%)
Kootenay	14 (50%)	3 (20%)	17 (40%)
Cariboo	19 (47%)	22 (47%)	41 (47%)
Skeena	25 (67%)	11 (50%)	36 (60%)
Omineca-Peace	53 (81%)	11 (40%)	64 (69%)
Provincial Total	115 (65%)	58 (44%)	173 (55%)

* *Data is unavailable.*

In some regions of the province, these summer guiding activities coincide with fish camp operations (see Chapter V). In 1978, 60 fish camp operations were run by or in association with Guide Outfitters. Most of these joint fish-hunt camps were located in the Cariboo region.

Providing guiding services to fishermen and other outdoor recreationists constitutes a very important part of a guide's business. In 1978, more non-hunters (4,565 - see Table 18) used guides than did hunters (a total of 4,426 non-residents purchased licences and of those that did hunt, not all used guides). It must be remembered that the regulation specifying a maximum of two hunters per guide, limits the number of hunters; the number of

TABLE 18

SUMMARY OF GUIDED NON-HUNTER ACTIVITY, 1978-79

Resource Management Region	Fishermen	Other Non-Hunters	Total Non-Hunters
Vancouver Island	90	20	110
Lower Mainland	0	30	30
Thompson-Okanagan	465	20	485
Kootenay	60	140	200
Cariboo	990	470	1,460
Skeena	295	310	605
Omineca-Peace	1,095	580	1,675
Provincial Total	2,995	1,570	4,565
Certificated Guides	1,690	990	2,680
Non-Certificated Guides	1,305	580	1,885

non-hunters per guide is not restricted. Some operations accommodated as many as 200 fishermen and up to 108 other non-hunters. Over half of those guides offering services to non-hunters (54.0%) felt that the proportion of their business from non-hunters has increased in recent years while 28.5% claimed that the importance of non-hunters has decreased.

The services offered to non-hunters are similar to the services offered to hunters. Most guides (80.0%) offered transportation, meals and accommodation in exchange for their fee. Some (9.1%) offered boats and accommodation to fishermen while others (5.5%) provided horses and meals. Other combinations of services are also available and in some cases (1.8%), the guide provides his services only. The fees paid for these services ranged from between $15 and $250 per day, but averaged about $76 per day for fishermen and $87 per day for other non-hunters.

2.5 Size of Guiding Operations

There is a tremendous variation in the size of guiding operations within the province. In 1978, 22.0% of all guiding businesses handled five or fewer hunters. Another 20.5% of guides accommodated between six and ten hunters. At the other end of the scale, 21.2% of guides provided services to more than twenty-five hunters during the year; some operations actually guided over one hundred hunters. The remaining 36.3% of guiding operations handled between eleven and twenty-five hunters. The distribution of guide operations according to the number of hunters they guided in 1978 is summarized in Table 19.

Guide operations in northern British Columbia (Regions 6 and 7) tended to be much larger than in other parts of the province. In the Skeena Region, 43% of operations guided more than twenty hunters while in the Omineca-Peace, over half of all guide businesses (53%) accommodated over twenty hunters.

TABLE 19

DISTRIBUTION OF GUIDING OPERATIONS BY NUMBER OF HUNTERS PER GUIDE, 1978-79

Resource Management Region	*Number of Hunters Per Guide Operation*							
	0	1-5	6-10	11-15	16-20	21-25	Over 25	Total
Vancouver Island	0	0	0	0	5	0	0	5
Lower Mainland	0	3	0	0	0	0	0	3
Thompson-Okanagan	0	0	10	7	0	4	3	24
Kootenay	5	10	12	3	3	2	7	42
Cariboo	5	24	14	12	10	10	12	87
Skeena	2	5	19	9	9	11	15	60
Omineca-Peace	3	10	21	5	5	21	28	93
Provincial Total	15	52	66	36	32	48	65	314

Another measure of the size of a guiding operation is the number of employees per operation. In conducting a guiding business, Guide-Outfitters usually hire Assistant Guides to do much of the actual guiding but also employ cooks, wranglers and others. Total employment by the industry in 1978 amounted to 1,665 persons. Of these some 890 Assistant Guides were actively employed (see section 6.0 for a more detailed assessment of the role of Assistant Guides). Another 775 people were hired for other positions, including 302 as cooks, 178 as wranglers and the remainder (295) were hired for other jobs.

As with the number of hunters per operation there is much variation in the number of employees per guide business. About 18% of all guide businesses were one man operations that provided income only for the Guide-Outfitter himself. Another 58% of operations could be classed as small businesses, hiring as many as five employees each. Intermediate sized operations (hiring between six and twenty people) accounted for a further 20% of all guide operations in the province. The remaining operations (5%) had over twenty employees, with some hiring as many as fifty people. The distribution of people employed is summarized in Table 20.

Guide operations in the Omineca-Peace Region hired many more employees than operations in other regions. Over three-quarters of all businesses with more than twenty employees were located in this Region. In the Cariboo, however, the average number of employees per guide was 2.0, this being well below the provincial average of 5.3 employees per guide.

Many operations within the guiding industry are family businesses. Almost 65% of all operations employed family members in 1978. Family businesses provided employment for up to 15 family members although most employed about 2.1 family members. Some operations also provided employment for both status and non-status Indians. In total it is thought that the guiding industry provided part-time

TABLE 20

DISTRIBUTION OF GUIDING OPERATIONS BY NUMBER OF EMPLOYEES PER OPERATION, 1978-79

Resource Management Region	*Number of Employees per Guide Operation*						Total	Average Employees Per Operation
	0	1-5	6-10	11-15	16-20	Over 20		
Vancouver Island	0	5	0	0	0	0	5	1.0
Lower Mainland	1	2	0	0	0	0	3	0.5
Thompson-Okanagan	7	14	0	3	0	0	24	4.4
Kootenay	13	24	0	5	0	0	42	3.4
Cariboo	20	62	5	0	0	0	87	2.0
Skeena	6	32	12	6	0	4	60	6.9
Omineca-Peace	8	42	16	8	8	11	93	8.8
Provincial Total	55	181	33	22	8	15	314	5.3

or seasonal employment for 475 status Indians and 215 non-status Indians, particularly in Region 7 (Omineca-Peace).

Resource Management Region	Number of Status Indians	Number of Non-Status Indians
Thompson-Okanagan	15	5
Kootenay	5	70
Cariboo	55	10
Skeena	135	35
Omineca-Peace	265	95
Provincial Total	475	215

The importance of the guiding industry as a source of employment should not be underestimated. On a provincial basis it has been suggested by Guide-Outfitters that 54% of their employees would have been unemployed if it were not for the guiding industry. Guiding employment is particularly important in northern British Columbia. About half of those employed by the industry in Regions 5,6 and 7 would likely have been unemployed, as indicated below.

Resource Management Region	Total Employees	Proportion of Employees Otherwise Unemployed	Number of Employees Otherwise Unemployed
Vancouver Island	5	100%	5
Lower Mainland	2	100%	2
Thompson-Okanagan	107	35.5%	38
Kootenay	139	41.7%	58
Cariboo	174	51.7%	90
Skeena	414	59.4%	246
Omineca-Peace	824	55.2%	455
Provincial Total	1,665	53.7%	894

Although guiding was not as important a source of employment in southern B.C., it can be concluded that the industry provided 894 permanent jobs and 771 seasonal jobs in 1978. It must be added that these unemployment estimates are based upon the Guide Outfitter's assessment of the employment situation for his employees, and there is no way of proving or disproving them.

2.6 Importance of the Guiding Industry

The importance of the guiding industry to the guides themselves depends primarily on the degree to which Guide-Outfitters depend upon guiding as a source of income. There were a substantial number of guides (28.0%) in 1978 who relied on guiding for less than 20% of their annual income and would probably consider guiding as seasonal employment. On the other hand, a slightly smaller group of guides (26.8%) relied on guiding for most (over 80%) of their total annual income. Guiding would constitute permanent employment for these individuals, most of whom are found in the Omineca-Peace Resion. The remaining 45.2% of guides were distributed fairly evenly between these extremes (see Table 21).

As alternate sources of employment, many guides (27%) worked in ranching or farming occupations during the off season. Ranching was a particularly important alternate occupation in the Cariboo Region. Another 20% of Guide-Outfitters who had other jobs worked in the forestry industry. Jobs in service-related industries provided alternative employment for another 5%. Trapping and fishing were alternate sources of income for a small proportion of guides (7%). Other alternate employment included jobs in transportation, construction, and sales-related industries.

3.0 ECONOMICS OF GUIDING

3.1 Revenues

For 1978 the total revenues received by guiding operations amounted to about $11,632,500. This figure represents payments by hunters for guiding services and includes payments by fishermen and other non-hunters who used guiding services. Estimated average revenue for each firm would then have amounted to $37,045 in 1978. As calculated in Chapter II, payments to guides by non-resident hunters (amounting to $5.8 million in 1977) would

TABLE 21

GUIDE OUTFITTERS' DEPENDENCE ON GUIDING AS A SOURCE OF INCOME IN 1978-79

Resource Management Region	*Percent of Total Income From Guiding*				
	Less than 20%	21-40%	41-60%	61-80%	Over 80%
Vancouver Island	0	0	0	0	5
Lower Mainland	3	0	0	0	0
Thompson-Okanagan	8	4	8	0	4
Kootenay	16	5	0	11	10
Cariboo	29	13	18	11	16
Skeena	16	14	8	10	12
Omineca-Peace	16	16	11	13	37
Provincial Total	88	52	45	45	84

have provided a substantial proportion of this income. Total payments by resident hunters using guides (about $83,000 in 1977) accounted for very little of this total. Thus, payments to guides by fishermen and other recreationists must have constituted almost half of the revenues received by guides.

Of this total revenue, most came from non-residents. Although the exact proportion attributable to non-residents is not exactly known, 79% of guiding businesses make over 80% of their income from non-residents.

Proportion of Income From Non-Residents	Number of Guide Operations
Under 20%	32
21% to 40%	3
41% to 60%	9
61% to 80%	22
Over 80%	248

On this basis the estimated revenue from non-residents amounted to about $10.41 million in 1978.

3.2 Operating Costs

Guide Outfitters reported their operating costs in terms of six different categories, including expenditures on labour, supplies, repairs and maintenance, taxes and interest charges, air charter and other items. In 1978, the average cost of operating a guiding business was $23,910. Total operating costs for the guiding industry amounted to $7,506,980, as summarized on Table 22.

Of all operating costs, labour costs ($3.36 million) represented the greatest proportion (44.8%). As noted in section 2.4, 1,665 people were employed by the guiding industry. Over half of this number were Assistant Guides. During the 1978 hunting season, Guide-Outfitters each hired an average of 5.3 employees and paid $10,710 in labour costs. For each category of employee,

TABLE 22

AVERAGE AND TOTAL OPERATING EXPENSES OF GUIDE OUTFITTERS IN 1978-79

Operating Expense	*Resource Management Region* 1 Vancouver Island	2 Lower Mainland	3 Thompson Okanagan	4 Kootenay	5 Cariboo	6 Skeena	7 Omineca Peace	Total Province
Labour	$10,000 ($2,000)	$2,400 ($800)	$109,920 ($4,580)	$339,150 ($8,075)	$271,440 ($3,120)	$783,600 ($13,060)	$1,846,515 ($19,855)	$3,363,025 ($10,710)
Supplies	$7,500 ($1,500)	$5,400 ($1,800)	$26,760 ($1,115)	$130,410 ($3,105)	$176,610 ($2,030)	$300,300 ($5,005)	$884,430 ($9,510)	$1,531,410 ($4,875)
Repairs and Maintenance	$2,500 ($500)	$2,100 ($700)	$10,800 ($450)	$51,240 ($1,220)	$91,350 ($1,050)	$147,900 ($2,465)	$458,025 ($4,925)	$763,915 ($2,435)
Taxes and Interest	-	$1,800 ($600)	$3,960 ($165)	$69,930 ($1,665)	$90,480 ($1,040)	$113,700 ($1,895)	$388,740 ($4,180)	$668,610 ($2,130)
Air Charter	-	$450 ($150)	$840 ($35)	-	$36,105 ($415)	$253,500 ($4,225)	$272,025 ($2,925)	$562,920 ($1,795)
Other	-	$900 ($300)	$25,320 ($1,055)	$29,400 ($700)	$42,195 ($485)	$133,800 ($2,230)	$385,485 ($4,145)	$617,100 ($1,965)
TOTAL	$20,000 ($4,000)	$13,050 ($4,350)	$177,600 ($1,400)	$620,130 ($14,765)	$708,180 ($8,140)	$1,732,800 ($28,880)	$4,235,220 ($45,540)	$7,506,980 ($23,910)

the average wages paid and the number of weeks worked are summarized below.

	Average Weekly Wage			*Number of Weeks Worked*		
Position	Average	Minimum	Maximum	Average	Minimum	Maximum
Assistant Guides	$304.34	$50	$700	7.19	1	16
Wrangler	$224.96	$125	$350	9.83	2	16
Cook	$252.21	$100	$500	9.42	2	30
Other	$221.47	$75	$400	17.10	2	52

In considering labour costs, it must be remembered that employees are often provided with room and board in addition to being paid wages. The cost of this room and board may be significant but has not been included in the calculation of labour costs. Also, many family members are employed by guides and in some instances may not be paid as much as other employees. This factor would suggest that the labour costs shown may not be representative of the actual value of the labour inputs to the industry.

As would be expected, labour costs increase as the number of employees increases. Thus, labour costs in the Omineca-Peace Region ($19,855 for 8.8 employees per operation) was substantially higher than in other Regions. There is also great variation in the annual wages paid to employees, ranging from $1,040 in Region 3 to over $2,375 in Region 4.

Resource Management Region	Average Labour Costs	Average Number of Employees	Average Wages Paid to Employees
Vancouver Island	$2,000	1.0	$2,000
Lower Mainland	$800	0.5	$1,600
Thompson-Okanagan	$4,580	4.4	$1,041
Kootenay	$8,075	3.4	$2,375
Cariboo	$3,120	2.0	$1,560
Skeena	$13,060	6.9	$1,893
Omineca-Peace	$19,855	8.8	$2,256
Provincial Average	$10,710	5.3	$2,020

Various factors may account for the observed variation in the average wages paid to employees. Duration of employment is likely to be the most important of these factors.

Expenditures on supplies amounted to $1.53 million and constituted the second greatest type of operating cost faced by Guide-Outfitters. The cost of the supplies purchased ranged from $1,115 per guiding operation in the Thompson-Okanagan Region to $9,510 in the Omineca-Peace Region. It is likely that this great range in supply costs among Regions is attributable not only to the number of hunters guided but also to the number of employees and length of time that each camp operates.

Repair and maintenance costs were estimated to have been about $.76 million in 1978 and represented about 10.2% of total operating costs. Again repair and maintenance costs in the Omineca-Peace Region were almost twice as great as the provincial average ($2,435).

Payments to governments in the form of taxes and to banks in the form of interest charges represented $0.67 million, or just under 9% of total operating costs in 1978.

Another 7.5% of operating costs ($0.56 million) went to charter airlines in the province. The use of these air services is particularly important in the more remote regions of the province and consequently guides in the Lower Mainland, Thompson-Okanagan and Kootenay Regions paid little or nothing for air services. Guides in the more isolated Skeena Region faced the highest costs for air charter.

Expenditures on advertising and other items amounted to $0.62 million and the remaining 8.2% of total operating costs in 1978. Advertising costs represent a major cost to some guides. Many guides use printed brochures and magazine advertisements to generate business. Other guides, however, take promotional trips throughout Canada, the United States and even Europe to persuade hunters to hunt in British Columbia. Much of the money spent on these trips is spent outside the province and must be considered as a loss to the provincial economy.

3.3 Earnings

The difference between revenues received and operating costs represents the earnings of the guiding industry. For 1978, revenues totalled $11.6 million while operating costs amounted to $7.5 miilion, yielding earnings for the industry of $4.1 million (more precisely, $4,125,520). This represents average earnings of $13,135 for each guiding operation. These earnings represent the returns to the guide for his business undertakings and his labour inputs to that business.

As owners/operators of their own business, many Guide-Outfitters retain a proportion of the business' earnings (25% in 1978) rather than pay themselves a wage. The amount of money that each guide receives from these earnings then depends upon the degree to which he own his business, as well as upon the operation's revenues and operating costs. In 1978, guides on average retained $3,330 of total earnings. This figure varied considerably, being highest in the Cariboo Region ($5,095) and lowest in the Skeena Region ($1,183). In the Lower Mainland, guides paid out considerably more for operating costs and investment and incurred an average loss of $12,300 per guide. A summary of these earnings is found as part of Table 32. In considering these earnings it must be remembered that Guide-Outfitters only receive a portion of their total annual income from their guiding business. The proportion of total income that guides earned from their guiding activities was discussed earlier, in section 2.5 and Table 21.

As seen in Table 23, there is considerable variation in the income that guides do earn. Almost half of all Guide-Outfitters earned

TABLE 23

EARNINGS RETAINED BY GUIDE OUTFITTERS IN 1978-79

Resource Management Region	*Earnings Kept by Guides in 1978*							
	Under $1000	$1000 to $2400	$2500 to $4999	$5000 to $9999	$10000 to $14999	$15000 to $19999	$20000 to $24999	$25000 to $29999
Vancouver Island	0	0	0	5	0	0	0	0
Lower Mainland	3	0	0	0	0	0	0	0
Thompson-Okanagan	8	8	0	4	4	0	0	0
Kootenay	6	3	6	11	8	0	6	2
Cariboo	20	17	12	23	9	0	3	3
Skeena	11	11	13	10	13	0	0	2
Omineca-Peace	11	11	14	16	19	6	8	8
Provincial Total	59	50	45	69	53	6	17	15
Proportion of Total	18.8%	15.9%	14.3%	22.0%	16.9%	1.9%	5.4%	4.8%

less than $5,000 in 1978. Another 22% earned between $5,000 and $10,000. Only a few (10%), most of whom operated in the Omineca-Peace Region, earned over $20,000.

Although this analysis provides an estimate of the money earned by guides, the benefits of working in the industry should also include the value of working and living in an outdoor location, and facing living expenses that are considerably below similar costs in urban settings. Being a family-oriented industry, family members do not have to earn large amounts of money in order to live comfortably. These indirect benefits of being employed in the industry cannot, however, be quantified.

3.4 Investment

In 1978 Guide-Outfitters invested a total of $3,079,540 in improving their operations. Average investment per Guide-Outfitter amounted to about $9,805. Much of this money was spent in constructing or improving buildings; approximately $821 thousand was spent on buildings in 1978, representing 27% of total investment (see Table 24). The purchase of aircraft and development of landing facilities in 1978 amounted to $475 thousand (15% of total). Investment in camping, hunting and packing equipment, accounted for $925 thousand or 30% of total investment. Investment in developing roads and trails and on other facilities accounted for the remaining $856 thousand.

Of all the monies invested in the industry, about half was spent on improvements to operations in the Omineca-Peace Region. However, Guide-Outfitters in the Skeena Region invested almost twice as much money per operation ($16,280) than did guides in the rest of the province.

Investment of this much money in the industry in one year is not unusual. Average investment in the industry over the last four years was about $2.5 million per year. Again, most development

TABLE 24

AVERAGE AND TOTAL INVESTMENT IN GUIDING BUSINESSES IN 1978-79

Investment Item	Resource Management Region 1 Vancouver Island	2 Lower Mainland	3 Thompson Okanagan	4 Kootenay	5 Cariboo	6 Skeena	7 Omineca Peace	Provincial Total
Buildings	-	$150 ($50)	$22,010 ($917)	$150,905 ($3,593)	$54,550 ($627)	$132,180 ($2,203)	$461,185 ($4,959)	$820,980 ($2,615)
Horses and Packing Equipment	-	$1,200 ($400)	$6,410 ($267)	$18,020 ($429)	$71,950 ($827)	$196,260 ($3,271)	$174,470 ($1,876)	$468,310 ($1,490)
Camping and Hunting Equipment	$1,250 ($250)	0	$9,190 ($383)	$13,820 ($329)	$39,325 ($452)	$199,260 ($3,321)	$195,020 ($2,097)	$457,865 ($1,460)
Roads and Trails	-	$16,500 ($5,500)	$6,000 ($250)	$35,405 ($843)	$19,750 ($227)	$45,840 ($764)	$138,385 ($1,488)	$261,880 ($835)
Aircraft and Landing Facilities	$3,000 ($600)	0	0	$880 ($21)	$32,190 ($370)	$126,000 ($2,100)	$312,945 ($3,365)	$475,015 ($1,515)
Other	$5,300 ($1,060)	$10,200 ($3,400)	$7,990 ($333)	$28,520 ($679)	$58,550 ($673)	$227,260 ($4,621)	$207,670 ($2,233)	$595,491 ($1,895)
Total	$9,550 ($1,910)	$28,050 ($8,350)	$51,600 ($2,150)	$247,550 ($5,894)	$276,315 ($3,176)	$976,800 ($16,280)	$1,489,675 ($16,018)	$3,079,540 ($9,805)

TABLE 25

AVERAGE AND TOTAL INVESTMENT IN GUIDING BUSINESSES, 1974-1977

Investment Item	Resource Management Region 1 Vancouver Island	2 Lower Mainland	3 Thompson Okanagan	4 Kootenay	5 Cariboo	6 Skeena	7 Omineca Peace	Provincial Total
Buildings	-	$6,600 ($2,200)	$76,800 ($3,200)	$547,260 ($13,030)	$275,355 ($3,165)	$320,400 ($5,340)	$1,332,225 ($14,325)	$2,558,640 ($8,150)
Horses and Packing Equipment	-	$9,600 ($3,200)	$28,800 ($1,200)	$118,020 ($2,810)	$127,020 ($1,460)	$369,300 ($6,155)	$565,440 ($6,080)	$1,218,180 ($3,880)
Camping and Hunting Equipment	$10,000 ($2,000)	$25,800 ($8,600)	$78,000 ($3,250)	$47,880 ($1,140)	$104,400 ($1,200)	$379,800 ($6,330)	$760,740 ($8,180)	$1,406,620 ($4,480)
Roads and Trails	-	$600 ($200)	$3,960 ($165)	$114,450 ($2,725)	$79,170 ($910)	$194,700 ($3,245)	$292,020 ($3,140)	$684,900 ($2,180)
Aircraft and Landing Facilities	$120,000 ($24,000)	-	-	$1,680 ($40)	$50,460 ($580)	$201,000 ($3,350)	$797,475 ($8,575)	$1,170,615 ($3,725)
Other	$201,000 ($40,200)	$90,000 ($30,000)	$30,840 ($1,285)	$719,880 ($17,140)	$280,140 ($3,220)	$205,200 ($3,420)	$1,535,430 ($16,510)	$3,062,490 ($9,755)
Total	$331,000 ($66,200)	$132,600 ($44,200)	$218,400 ($9,100)	$1,549,170 ($36,885)	$916,545 ($10,535)	$1,670,400 ($27,840)	$5,283,330 ($56,810)	$10,101,845 ($32,170)

of facilities occurred in the Omineca-Peace Region (see Table 25). Even guides in the Skeena Region had not invested half as much as had guides in Region 7 (Omineca-Peace). It is possible that one reason for guides in Region 6 (Skeena) to have invested so much more in 1978 was to bring their operations up to a quality equal to that found in other parts of northern British Columbia.

For an average guiding operation approximately $32,170 would have been invested in the period from 1974 to 1977. Of this, most would have gone to buildings and other expenditures, with lesser amounts going to buy aircraft and camping, hunting and packing supplies. It should be considered that guides who do not have much money to spend on purchasing equipment often spend much of their time and energies to build their own facilities. Thus the true value of improvements made to guiding operations may be greater than the amount of money spent by guides because the value of labour inputs has not been added.

To summarize, the average guiding operation invested $9,805 in equipment and facilities in 1978. Over the previous four year period, $32,170 had already been used to develop guiding operations. Total investment in each operation over the past five years would then have amounted to $41,980.

3.5 Extent of Canadian Ownership

Of recent concern has been the degree to which Canadian businesses are owned and controlled by non-Canadians. There is, however, very little foreign ownership of the guiding industry. Only British Columbians can purchase a Guide-Outfitter's Licence or hold a Guide-Outfitter's Certificate. Foreign interests can, however, provide guides with financial backing and assume some control over how the guide runs the business. Only 5.1% of all guiding operations have any degree of non-Canadian ownership and these businesses are found only in the Skeena and Omineca-

Peace Regions of the province. Only 2.5% of operations would appear to have the majority of ownership in foreign hands. The extent of Canadian ownership of guiding businesses is summarized below.

Resource Management Region	Less than 40%	Proportion of Canadian Ownership 41% to 60%	61% to 80%	81% to 99%	100%
Skeena	4	0	0	4	52
Omineca-Peace	0	8	0	0	85
Provincial Total	4	8	0	4	298
Proportion of Guiding Industry	1.3%	2.5%	0%	1.3%	94.9%

4.0 REGIONAL ECONOMIC IMPACT

There are a number of ways in which regions benefit from the activities of Guide-Outfitters. First, guiding creates employment and income for those directly employed in the industry. Second, guide's expenditures on goods and services can create employment and income benefits within the regional economy. By determining guides' spending patterns it is then possible to calculate the proportion of their operating costs that stay within the region.

As previously noted, guides employed 1,665 people in 1978 and paid out almost $3.4 million in wages. Although guides in Regions 1, 3 and 4 hired only local labour, (see Table 26), guides in other Regions of the province had some employees from outside their respective Regions. Consequently, about 95% of all labour costs incurred, stayed within the various Regions.

The employment created by guides' expenditures on local goods and services is not known because it is extremely difficult to determine whether or not a job would actually be created as a result of guide expenditures. However, about 94% of all goods and services were purchased within the Region in which the guide

TABLE 26

PROPORTION OF OPERATING COSTS SPENT IN LOCAL ECONOMY IN 1978-79

Resource Management Region	Expenditures on Local Labour		Expenditures on Local Goods & Services*		Total Local Expenditures	
	Amount	Proportion of Total Labour Costs	Amount	Proportion of Total Expenditures	Amount	Proportion of Total Expenditures
Vancouver Island	$10,000	100%	$10,000	100%	$20,000	100%
Lower Mainland	2,100	88%	8,550	97%	10,650	95%
Thompson-Okanagan	109,920	100%	58,200	91%	168,120	97%
Kootenay	339,150	100%	211,050	100%	550,200	100%
Cariboo	242,295	89%	321,900	93%	564,195	91%
Skeena	730,200	93%	788,700	94%	1,518,900	94%
Omineca-Peace	1,756,770	95%	1,863,720	93%	3,620,490	94%
Provincial Total	$3,190,435	95%	$3,262,120	94%	$6,452,555	94%

* *Excludes taxes and interest charges.*

operated. This proportion of expenditures on local goods and services was relatively consistent throughout the province.

Thus, the regional economies receive most of the direct and indirect benefits of expenditures made by Guide-Outfitters. For the Omineca-Peace and Skeena Regions, these regional economic benefits make the guiding industry a very important source of both employment and income.

5.0 GUIDE OUTFITTERS' CERTIFICATES

The introduction of Guide-Outfitter's Certificates in 1970 represented a major step in the development of the guiding industry. The certification process provided monopoly guiding rights to a specified area and allowed these guiding rights to become the property of the Guide Outfitter. One intent of these changes was to create an incentive for guides to better manage their hunting clientele and services within their allotted territories. It was also hoped that the creation of property rights (which could be sold or borrowed against and become part of the guide's estate) would provide the security necessary for guides to invest money in developing their guiding businesses. The success of the certification process has never really been examined in detail, however, at this time some 203 Certificates have been granted to guides in most Regions of the province.

There are major differences between the operations of certificated and non-certificated guides. It is not clear however, whether the certification process has caused these differences, or whether only certain types of guide operations applied for Certificates. There is general agreement among certificated guides that the Certificate has helped business, but it is not possible to determine the extent of this help. It is also likely that those guides who had the bigger operations (and therefore the most to gain) recognized the security that a Certificate offered.

Regardless of which causal relationship is more appropriate, significant differences do exist. For 1978, the amount of business, investment and operating expenses experienced by both certificated and non-certificated guides have been summarized on Table 27. The most important of these differences is the number of clients that each type of operation services. Certificated guides had 25% more clients than did non-certificated guides. It would then be expected that average revenues were higher for certificated guides.

Certificated guides in 1978 had operating costs that were twice the costs incurred by guides without Certificates. Labour costs were over twice as high for certificated guides, suggesting that they employed twice as many people as did non-certificated guides. In fact, certificated operations employed 6.4 people compared to 3.6 for non-certificated guides. Taxes and interest charges paid were 160% higher for guides having Certificates, and other expenses (particularly advertising) were over three times as great as for non-certificated guides.

In terms of total investment in their businesses in 1978, the differences between guide operations with and without Certificates are less noticeable. Although certificated operations invested 30% more than other operations, there are some specific differences in the types of investments made. As a proportion of total investment, non-certificated operations invested more money in hunting and camping equipment. On the other hand, investments made by certificated guides in aircraft and landing facilities were over three times as great as for non-certificated guides. This would suggest that certificated guides are investing in more sophisticated and advanced facilities and non-certificated guides are still developing their basic services. The amount of money invested in buildings in 1978 would also suggest that guide businesses having Certificates are becoming much more elaborate operations.

TABLE 27

COMPARISON OF CERTIFICATED AND NON-CERTIFICATED GUIDE OPERATIONS IN 1978-79

	Certificated Guides	Non-Certificated Guides	All Guides
Average Number of Clients			
Total	37.0	26.2	32.8
Average Investment in 1978			
Buildings	$3,277	$1,352	$2,615
Horses	$1,668	$1,531	$1,490
Camping Equipment	$1,630	$1,540	$1,460
Roads	$972	$712	$835
Aircraft	$2,145	$681	$1,515
Other	$1,733	$2,957	$1,895
Subtotal	$11,425	$8,773	$9,810
Average Operating Costs			
Labour	$13,990	$6,014	$10,710
Supplies	$6,217	$3,162	$4,875
Repairs	$3,124	$1,466	$2,435
Taxes	$2,768	$1,056	$2,130
Air	$2,532	$1,069	$1,795
Other	$2,703	$732	$1,965
Subtotal	$31,334	$13,499	$23,910
TOTAL	$42,759	$22,272	$33,720

A similar investment pattern has occurred over the previous four years. Certificated operations invested considerably more money in buildings and aircraft. The greatest annual investment for non-certificated guides has been in camping and hunting equipment. Total investment over the period from 1974 to 1978 averaged $35,900 for certificated guides and $24,519 for other guides.

The idea that certificated operations are more developed and diversified is also suggested by the types of services offered and by the importance that guiding income has for the Guide Outfitter. Only 44% of non-certificated operations provided services to non-hunters while 65% of certificated guides accommodated fishermen and other non-hunters. It is likely then that certificated guides operated their businesses for a greater part of the year. Guiding provided a much greater proportion of total income to certificated guides than to other guides. Eighty-five of 178 certificated guides were estimated to earn more than 60% of their total annual income from their guiding activities. On the other hand, sixty-three of 136 guides not having Certificates were reported to make less than 20% of their income from guiding. Certificated guides also received considerably more income from guiding. No non-certificated guide reported receiving more than $15,000 from guiding in 1978 while 19% of all certificated guides reported making more than $15,000.

Of those guides currently having Certificates, most (69%) acquired their Certificates on territories in which they had been guiding for some years. The other group (31% of certificated guides) acquired their Certificates by purchasing them from previous owners. In a few cases, guides with Certificates have purchased all or part of other certificated areas and combined them into one large guiding area. The cost of purchasing these territories generally ranged between $5,000 and $100,000 depending on facilities, and location.

Most guides with Certificates consider the Certificate to have helped their operation. Security was the primary benefit of the Certificate (mentioned by 37% of certificated guides). Monopoly guiding rights was also an important factor (19% of guides) while other guides (17%) felt that the Certificate created an incentive to manage the resource and that this was the greatest benefit of the Certificate. Still other guides (8%) have suggested that having a Certificate necessitates improving their operations so that the industry as a whole benefits.

Some 28% of certificated guides felt that the Certificate did not help. Of these many felt that the Certificate in itself meant nothing. A few guides felt that they were more restricted by the Certificate. The majority felt that other problems, particularly lack of participation in decision making affecting the industry, overshadowed the benefits that a Certificate could have.

In determining why guides wanted Certificates, most (63%) felt that the security it provided was of great importance. Some (18%) wanted the Certificate to guarantee monopoly guiding rights. A number of guides (9%) claimed that they were asked or required by the government to get Certificates. Another group (4%) obtained a Certificate in order to gain the better reputation that they felt certificated guides had.

For most guides, the security inherent in the certification process has encouraged them to better develop their businesses. 75% of certificated guides indicated they invested more money in their operation as a result of possessing a Certificate.

The value of guiding businesses with Certificates has increased in recent years due to the saleability of guiding rights in addition to just the facilities. Certificated guides felt that the selling value of their guiding business ranged between $4,500 and $1,500,000 in 1978. The average value of a certificated business in 1978 was found to be $168,000 although most guides estimated the value of their business to have been $50,000. It was thought that the value of the Certificate (and the rights that go along with it) was about $26,900 or about 16% of the total value of the guiding business.

The majority of non-certificated guides have never applied for a Certificate. Some (23%) are presently in the process of applying. A slightly larger group (33%) have applied for Certificates but did not receive them. There appear to be a number of obstacles that guides feel are preventing or inhibiting them from receiving Certificates. Although many (35%) are unsure as to what those obstacles are, some (18%) note that Certificates are just not being issued in their area while others (18%) still share their guiding territories with other guides. Other obstacles include the guiding area being too small, or lack of money.

Over a third (35%) of non-certificated guides do not want Certificates. Most of these guides claim that the Certificate would be of no help to their operation. Others do not want a Certificate because it is not required to run a guide business. A smaller group are simply satisfied with their operation and tenure as it presently exists. In some cases guides claim that they have been advised by a government agency not to get a Certificate.

The remaining 65% of non-certificated guides feel that they will attempt to obtain a Certificate at some time in the future. Of these about 15 are already in the process of applying. Like guides with Certificates, most non-certificated guides (73%) feel that the primary advantage of the Certificate is the security it provides. Others also note monopoly guiding rights and the incentive to manage wildlife resources as important advantages.

Although the process of guide certification generally seems to have promoted development of the industry, there is now a need to define the eventual goal of the certification program. Contact with the seven regional offices of the Fish and Wildlife Branch during the course of this study has revealed inconsistencies among Regions in terms of how the guide certification program is being administered. In addition, it is not clear whether the Branch is working toward the day when all guides will have Certificates or whether a maximum number of Certificates will be issued. Given these questions at this stage of the growth of the guiding industry, clearly defined policies regarding the future of Certificates must be established, especially since some guides do not know what Certificates are, let alone understand what they mean.

6.0 GUIDE OPINIONS AND CONCERNS

At this point in the development of the guiding industry there are a number of issues which could play a crucial role in its further development. Some of these issues involve guides throughout the province. Within each Region, however, there are usually other issues which are equal or greater in significance.

The most commonly identified concern of the guiding industry throughout British Columbia is that of increased access to better hunting areas. One out of every three guides identified access as the critical factor that will affect their business. Roads created by logging companies, mining companies and other resource development industries allow easier access for resident hunters who are already competing with guides for wildlife populations, destroys habitat and destroy the wilderness quality of the immediate area. In addition to reducing wildlife populations and the guide's clientele, increased access will cause the value of the guide's business/Certificate to decline. Access problems were particularly significant in the Kootenay and Cariboo Regions with 53% and 48% (respectively) of guides noting these problems.

The second most important issue on a province wide basis is competing land uses. Like access roads, other land uses reduce wildlife populations and affect the wilderness qualities of the area. Under present regulations, even Certificates guarantee only the rights to guide and infer no rights to the game itself. It is conceivable that logging companies could clearcut a guide's territory completely and not be required to compensate the guide in any way. While this situation has already occurred to varying degrees in certain parts of the province, the potential for this to happen is of great concern to 31% of all Guide Outfitters. This issue was noted by 39% of guides in the Cariboo, 20% of guides in the Kootenays, 31% of guides in the Omineca-Peace Region and 32% of guides in the Skeena Region.

Problems with Fish and Wildlife Branch policies and practices were the third most commonly mentioned issue. Although the full range of these problems is not known, guides have expressed concern with the quota system and the determination of quotas, enforcement, procedural difficulties with game checking stations and the issue of game export permits, and the determination of open and closed seasons on the sexes and various species of big game animals. Problems with the Branch received the most responses from guides in the Skeena Region (23%) and guides in the Omineca-Peace Region (34%).

Concern over predators, particularly wolves, was mentioned by 13% of all guides, notably in the Skeena (19%) and Omineca-Peace (17%) Regions. This problem has been emphasized by apparent increases in wolf populations and low caribou populations in parts of the province where the hunting season had to be closed early. The decision by the Minister of the Environment to suspend predator poisoning programs has caused great alarm.

Competition with resident hunters was the fifth most important concern of the industry, being mentioned by 12% of guides. Although non-residents generate much income and employment in the province, the Fish and Wildlife Branch must, under approved government policy, give priority to resident hunters. Resident hunters pay significantly lower hunting licence costs and are allowed to hunt just about anywhere in the province, including the territories of Guide Outfitters. Concern over resident hunter activities was most common in the Omineca-Peace (20%) and Skeena (19%) Regions.

Lesser issues noted by guides included the following:

- Lack of enforcement of regulations (4%)
- Lack of game (specifically in the Cariboo and Skeena areas) (8%)
- Illegal hunting activities (3%)
- Cost of non-resident hunting licences (2%)
- Conflicts with anti-hunter groups (3%)
- Excessive hunting pressure on female animals (2%)

Three other problems deserve special attention: quotas, packers and industry recognition. Although few guides (5%) actually identified recognition of the industry as a problem, most of the other issues above are, to some extent, symptoms of a greater problem, for without greater representation of the guides in the decision making processes that affect them, there is very little that guides can do to solve or avoid their problems. Guides claim that much of their discontent with the Fish and Wildlife Branch is due to their lack of input and recognition in decisions and policies which directly affect their well-being.

To this point in time, arguments concerning the allocation of wildlife resources between resident and non-resident hunters have dominated wildlife management decisions. Little attention has been paid to the impact that any change in resident/non-resident allocations would have upon the guiding industry. The change in the cost of non-resident hunting licences in 1974 and the introduction of quotas in 1976 has probably brought this issue of representation to a head. If the observed decline in non-resident hunters after 1974 was due to the increased licence costs that non-residents then had to pay, 170 full and part-time jobs in the guiding industry may have been lost by an attempt to generate additional direct revenues for the province. Fear of similar situations occurring has brought the question of representation to the forefront.

The introduction of quotas has been met with mixed emotions. In principle, 47% of certificated guides and only 20% of non-certificated guides agreed with the need for quotas. Of those who thought that quotas ought to be applied, most guides wanted quotas on grizzly bear, mountain sheep and mountain goat. Some even suggested quotas on all species. As applied, however, most guides are very upset. They claim that quotas applied only to harvests by non-residents will not work to improve big game populations unless similar restrictions are applied to resident hunters. Additional concern has arisen over the manner in which quotas are calculated. For thinhorn sheep, the quota system as proposed by the Fish and Wildlife Branch was envisaged by the Western Guide and Outfitters Association to:

(i) restrict the number of hunters a guide can take without significantly reducing the harvest;

(ii) result in the loss of 250 jobs of which 200 would involve the native workforce; and,

(iii) cause an estimated annual loss of $1.5 million to the economy of Northern B.C.*

Although there are no calculations to show how these estimates were derived, the magnitude of the numbers should attest to the significant impact that guides feel a quota system could have upon the guiding industry.

The other special concern of the guiding industry at this time relates to the operation of the packing industry. Although resident hunters represent only a small proportion of a Guide Outfitter's clientele, there is still competition between guides and packers when it comes to providing outfitting servces. In contrast to guides, packers are completely unregulated, have no territorial restrictions, and have no performance standards to meet. Thus, the packer has a competitive advantage in the market for resident hunters and the market for non-hunters. In addition, packers can "invade" a Guide Outfitter's registered territory because resident hunters are entitled to hunt anywhere in the province. This would seem to some extent an infringement of the principle of a Certificate's granting monopoly guiding rights.

---

* *Submission by Western Guides and Outfitters Association entitled, Proposed Harvest Techniques of Ovis dalli (sic)*

Most of the problems with packers occur in northern British Columbia. As reported, 53% of certificated guides and only 25% of non-certificated guides had trouble with packers. In 1978, 41% of guides in the Cariboo reported problems, while 45% reported confrontations in the Skeena Region. And in Region 7 (Omineca-Peace) over half (53%) of all guides claimed to have major problems with packers. With these conflicts with packers apparently on the increase, some regulation of packers consistent with the regulation of guides may be considered adviseable.

7.0 ASSISTANT GUIDES

With the apparent trend in the guiding industry toward fewer but bigger operations, there has been an increasing demand for Assistant Guides. As each guide (Assistant or Guide Outfitter) can only accompany two hunters at a time, Guide Outfitters can only increase their hunting clientele by hiring more Assistant Guides to do the actual guiding. For the 1977-78 hunting season, Assistant Guides accompanied non-resident hunters on nearly twice as many occasions as did Guide Outfitters. Thus, Assistant Guides are more responsible for actual hunting activities in the field than are Guide Outfitters.

For the 1978 hunting season, some 988 people purchased Assistant Guide's licences, up from 953 in the previous year. In relation to the number of Guide Outfitters, there were 3.2 Assistant Guides for every Guide Outfitter in 1978, compared to 2.9 in 1977. Of course not everyone who purchases an Assistant Guide's licence actually guides. Based on information from Guide Outfitters reporting on their yearly activities, only about 90% of all licenced Assistants are active in any given year. For 1977 there were 851 active Assistant Guides and in 1978 there were probably about 890.

Assistant Guides were active throughout the province, although the vast majority were working in the two northern Resource Management Regions. The distribution of Assistant Guides by Management Region in 1977* is summarized below.

Resource Management Region	Number of Active Assistant Guides	Percent of Total
Vancouver Island	2	0.2
Lower Mainland	1	0.1
Thompson-Okanagan	31	3.7
Kootenay	102	12.0
Cariboo	154	18.1
Skeena	178	20.9
Omineca-Peace	383	45.0
Provincial Total	851	100.0

There are four main reasons why people purchase Assistant Guide Licences aside from just being able to work for a guide and receiving payment for doing so. The most important of these is that people may simply enjoy hunting and working outdoors. For the 1977 hunting season, 70% of Assistant Guides indicated that enjoying the work was their primary reason for obtaining a licence. As a second reason, only 16% suggested that their primary motivation for becoming an Assistant Guide was to supplement their annual income. A third reason relates to qualifying for a Guide Outfitter's Licence: only people who have been an Assistant Guide for at least two years can become Guide Outfitters. In

---

* *Information on Assistant Guide activities in 1978 is not yet known.*

1977, qualifying for a Guide Outfitter's Licence was the incentive for 12% of Assistant Guides to obtain their licences. The fourth reason for purchasing an Assistant Guide's Licence relates to the territorial limitations on Guide Outfitters. For a Guide Outfitter to guide outside his allotted territory, he must acquire an Assistant Guide's Licence. Some 35 licences were purchased in 1977 for this reason.

Guiding is a seasonal occupation. In 1977, Assistant Guides each worked for up to 26 weeks during the hunting season or about 7.4 weeks per active guide. It is notable that the Assistant Guides in the more northern Resource Management Regions worked for a longer period than other Assistant Guides (see Table 29). Of all active Assistant Guides, the majority (64%) have regular jobs when not guiding. However, only 27% of all active Assistant Guides actually gave up a job in order to guide. Typically, these regular jobs were in logging and forestry (29.3%), farming and ranching (12.1%) and other fishing, hunting and trapping activities (10.3%). Other Assistant Guides had jobs in mining (8.6%), construction (6.9%) and as equipment operators (6.9%).

In terms of the regional employment benefits of the guiding industry both permanent and seasonal employment is created for Assistant Guides. Guiding provided full time employment for about 298 Assistant Guides who had no other occupations in 1977 (see Table 28). Seasonal employment was created for the approximately 288 Assistant Guides who had a regular job but who did not give up that job in order to guide. (One would infer that the regular jobs in these instances were also seasonal and alternate with guiding from season to season.) Seasonal employment was also created for the other 231 Assistant Guides who were lured away from other jobs in the economy for reasons of enjoyment rather than money. (As this creates an equal number of job opportunities in the rest of the economy, the guiding industry is responsible for creating 234 seasonal jobs.) Thus, the guiding industry was responsible for creating

TABLE 28

EMPLOYMENT CREATED BY THE GUIDING INDUSTRY FOR ASSISTANT GUIDES IN 1978-79

Resource Management Region*	*Permanent Jobs*	*Seasonal Jobs* Did Not Give Up Regular Employment	Gave Up Regular Employment	Total Jobs Created
Kootenay	32	51	19	102
Cariboo	77	48	29	154
Skeena	51	93	34	178
Omineca-Peace	138	96	149	383
Provincial Total	298.	288	231	817
Percent of Total Jobs Created	36.5%	35.2%	28.3%	

**Data for Resource Management Regions 1 to 3 is incomplete or unavailable.*

at least 817 jobs (both seasonal and permanent) in 1977 and all employment income paid to Assistant Guides represents the income benefits of the guiding industry (no opportunity costs of labour).

The social characteristics of people who work as Assistant Guides vary widely, particularly between Resource Management Regions (see Table 29). In age, Assistant Guides in 1977 ranged from 19 to 69, however, the average was about 35 years old. Assistants in Regions 6 and 7 tended to be younger than average. In terms of guiding experience, Assistants in Region 6 were considerably below the provincial average of 6.8 years per guide. Throughout the province, both status and non-status Indians were employed as Assistant Guides. In 1970 about 170 Indians (both status and non-status) were employed as Assistants. The majority of these were status Indians employed in Region 7.

The extent to which Assistants depend on guiding as a source of income also varies considerably throughout the province (see Table 30). Almost half of all Assistant Guides make less than 20% of their total income from guiding. It must be considered, however, that about 28% of Assistants are employed as part of a family business (the Guide Outfitter is related to the Assistant Guide) and may receive no "income" from guiding other than room and board. Assistant Guides' incomes from guiding ranged from $0 to $10,000 in 1977-78, although the average earnings were closer to $2,290 per guide. Translated into average earnings per week, Assistant Guides made about $297 per week in 1977-78. Assistants in Region 7 (Omineca-Peace) had weekly earnings below this average, while Assistants in the Skeena Region had weekly incomes 26% higher than average.

Although very few people purchased an Assistant Guide's Licence for the purpose of qualifying for for a Guide Outfitter's Licence, most Assistants (60.9%) wish to become a Guide Outfitter at some time in the future. However, various obstacles exist and are preventing Assistant Guides from becoming Guide Outfitters. Such

TABLE 29

SOCIAL AND ECONOMIC CHARACTERISTICS OF ASSISTANT GUIDES, 1977-78

Resource Management Region*	Average Age	Average Years Of Guiding Experience	Average Number of Weeks Worked	Average Earnings	Average Wage Per Week
Kootenay	36.3	5.2	5.5	$1,935.67	$351.94
Cariboo	45.3	11.2	5.3	$1,242.86	$234.50
Skeena	33.4	5.1	8.2	$3,058.95	$373.04
Omineca-Peace	31.4	6.2	9.0	$2,442.26	$271.36
Provincial Total	35.1	6.8	7.7	$2,287.33	$297.06

* *Data for Resource Management Regions 1 to 3 is unavailable or incomplete.*

TABLE 30

ASSISTANT GUIDES DEPENDENCE ON GUIDING AS A SOURCE OF INCOME, 1977-78

Resource Management Region*	*Percent of Total Income From Guiding*				
	Less Than 20%	21-40%	41-60%	61-80%	Over 80%
Kootenay	73	22	0	0	7
Cariboo	82	41	21	0	10
Skeena	84	56	10	9	19
Omineca-Peace	158	90	79	22	34
Provincial Total	397	209	110	31	70
Percent of Total	48.6%	25.6%	13.5%	3.8%	8.5%

* *Data for Resource Management Regions 1 to 3 is incomplete or unavailable.*

obstacles were noted by 68% of all Assistant Guides and include:

- insufficient funds to operate independently
- no available guiding areas
- high risk of operating independently
- uncertainty about profitability of operations
- problems with Fish and Wildlife Branch policies and practices, and,
- other problems, such as age, health, and logging problems.

These factors have been rated by order of importance for each Resource Management Region (see Table 31). Lack of funds seems to have been the primary obstacle throughout the province, although problems with lack of guiding areas were also predominant. Profitability was a major concern in both the Kootenay and Omineca-Peace Regions. Problems with Fish and Wildlife Branch were of importance only in Region 6 (Skeena). As to their immediate future, most Assistant Guides in 1977 (90%) planned to continue to work as Assistants while 9% would not continue.

8.0 SUMMARY

The guiding industry in British Columbia in 1978 consisted of 314 Guide Outfitters who provided various services to both resident and non-resident hunters, fishermen and other outdoor recreationists. To provide these services guides employed approximately 1,665 employees, more of half of which were Assistant Guides.

A summary of the economic characteristics of the guiding industry in British Columbia in 1978 is presented in Table 32 and illustrates average and total income, operating costs, earnings and investment for guiding businesses in each of the province's seven Resource Management Regions. In return for their services, guiding operations received approximately $11.6 million, most of which came from non-resident hunters. Operating costs amounted to $7.5 million. Over 94% of the goods and services required by the industry were purchased within the Regions in which the guides operated.

TABLE 31

TYPES AND FREQUENCY OF OBSTACLES PREVENTING ASSISTANT GUIDES FROM BECOMING GUIDE OUTFITTERS

Obstacles to Becoming A Guide Outfitter	*Resource Management Region** Kootenay	Cariboo	Skeena	Omineca Peace	Provincial Total
Insufficient funds	25%	60%	67%	90%	66.1%
No areas available	25%	60%	33%	55%	50.8%
Lack of experience	50%	10%	-	35%	20.3%
High risk of operating independently	12%	-	17%	35%	18.6%
Uncertainty about profitability	50%	10%	17%	50%	32.2%
Problems with Fish and Wildlife Branch	12%	10%	42%	25%	25.4%
Other problems	12%	10%	17%	10%	13.6%

**Data for Resource Management Regions 1 to 3 is incomplete or unavailable.*

TABLE 32

SUMMARY OF THE ECONOMICS OF THE GUIDING INDUSTRY IN BRITISH COLUMBIA, 1978-79

	Resource Management Region							
	1 Vancouver Island	2 Lower Mainland	3 Thompson Okanagan	4 Kootenay	5 Cariboo	6 Skeena	7 Omineca Peace	Total Province
Gross Income (Average)	$40,000 ($8,000)	$4,200 ($1,400)	$327,775 ($13,655)	$941,065 ($22,405)	$1,427,722 ($16,410)	$2,780,503 ($46,340)	$6,111,235 ($65,710)	$11,632,500 ($37,046)
Operating Costs (Average)	$20,000 ($4,000)	$13,050 ($4,350)	$177,600 ($7,400)	$620,130 ($14,765)	$708,180 ($8,140)	$1,732,800 ($28,880)	$4,235,220 ($45,540)	$7,506,980 ($23,910)
Earnings (Average)	$20,000 ($4,000)	-$8,850 (-$2,950)	$150,175 ($6,255)	$320,935 ($7,640)	$719,542 ($8,270)	$1,047,700 ($17,460)	$1,876,015 ($20,170)	$4,125,520 ($13,135)
Earnings Invested (Average)	$9,550 ($1,910)	$28,050 ($8,350)	$51,600 ($2,150)	$247,550 ($5,894)	$276,315 ($3,176)	$976,800 ($16,280)	$1,489,675 ($16,018)	$3,079,540 ($9,805)
Retained Earnings (Average)	$10,450 ($2,090)	-$36,900 (-$12,300)	$98,575 ($4,105)	$73,385 ($1,747)	$443,227 ($5,095)	$70,962 ($1,183)	$386,340 ($4,154)	$1,045,980 ($3,330)

Guides invested $3.1 million in 1978 in developing and improving their businesses. Total investment in the industry over the last five years amounted to $10.1 million, half of which was invested by guides in the Omineca-Peace Resource Management Region.

IV

THE PACKING INDUSTRY

The demand for packing services in British Columbia originated with prospectors, surveyors, geologists and others who required access into the isolated interior of the province. With the advancement of roads and air transportation services, the demand for packing services has declined and is now primarily limited to resident hunters, fishermen and other recreationists who demand wilderness recreation experiences. At the present time the packing industry operates almost exclusively in the north of the province - in Resource Management Regions 5, 6 and 7. Services provided by packers are basically transportation and accommodation, as they are not allowed to actively guide hunters - guiding being the exclusive right of a licenced guide. Packers' clients consist primarily of resident hunters, as non-resident hunters must, by law, hire a licenced guide. Although a few residents do hire guides each year (80 did so in 1977/78) this tends to be quite costly as guides cater to a captive international market and their fees are set accordingly. Resident hunters have, therefore, tended to hire packers who can provide two of the basic components of the guiding service - transportation and accommodation - at a lower fee than must be paid for the full services of a guide. The number of resident hunters hiring packers is believed to have increased significantly in recent years, although there is no agency which collects data that would provide a statistical record of this.

Because packers are not restricted in the area in which they can provide their services, and can in fact operate in any area in which it is legal for their clients (resident hunters) to hunt, conflicts have been emerging between packers and Guide Outfitters. This conflict arises as the two client groups, resident and non-resident hunters, compete for the available wildlife. These conflicts are occurring in the northern part of the province where access to many remote wildlife species is difficult. In other areas of the province, where access for residents is much easier, they do not require packers, and while their demands on the resource may cause the same conflicts with non-residents and licenced guides, the packers are not a part of the issue. Conflicts between packers and guides can be expected to continue in the northern part of the province, due to the different regulatory frameworks that exist and the differing industry structure that results.

1.0 REGULATORY FRAMEWORK

In contrast to the guiding industry which is subject to specific guiding regulations under the Wildlife Act, the packing industry falls only under the general provisions of the Wildlife Act. Thus, there is no special licence needed to act as a packer, there is no public liability insurance requirement, and there are no specified duties or performance criteria which govern a packer's activities. Unlike Guide Outfitters who are required to pay a royalty on any animals killed by their clients, packers pay no such royalties.

The only specific controls placed on the activities of packers have evolved as a result of the Fish and Wildlife Branch having to differentiate between guides and packers. Under present interpretations of the Wildlife Act, a packer cannot directly or actively assist in the hunt. Such an interpretation allows both packers and guides to operate within the law until such time as the Wildlife Act is amended to allow packers to legally guide B.C. residents (as recommended by the Resident Wildlife and Tourist Association), or to force packers to purchase Guide-Outfitter's Licences and operate as part of the guiding industry (as recommended by Western Guides and Outfitter's Association). Other options may exist, but have not yet been identified.

2.0 INDUSTRY STRUCTURE

2.1 Number and Distribution of Packing Operations

The number of packing operations presently active in British Columbia is not known. No records exist because there are no licence or other reporting requirements for packers. The Resident Wildlife and Tourist Association claims to have five members who are "packers," of whom three were actually in operation in 1978. In 1977, the Western Guides and Outfitter's Association noted some 32 other individuals or businesses thought to be operating as packers. Even this list is thought to be incomplete considering the number of guides who reported having problems with packers in 1978.

Attempts to contact packers for the purposes of this study have met with little success. Although 24 questionnaires were sent out, only five individuals provided answers and only three were active in 1978. While this number is too small to be considered as representative of the packing industry, the information they provided will be discussed here to illustrate various characteristics of the industry.

Most packers operate in the northern part of the province. As mentioned in section 6.0 of Chapter III, 53% of guides in Region 7, 45% of guides in Region 6, and 41% in Region 5, indicated problems with packers operating in their territories in 1978. The three completed questionnaires were from packers who operated in the Omineca-Peace Resource Management Region (Region 7).

2.2 Services Provided for Hunters

The services provided by packers represent one crucial difference between guide and packer. Although both guide and packer can provide accommodation and transportation services for their hunting clients, the packer according to current interpretations of the Wildlife Act cannot directly or indirectly assist in the hunt. Despite this interpretation, there are still some arguments concerning exactly what does or does not constitute "active" participation in the hunt. In some instances, packers have been prosecuted under the Wildlife Act, and convicted of illegal guiding activities. This differentiation between guides and packers on the basis of allowable services, is the main factor responsible for variations in the structure and operation of the two industries.

As reported by packers in 1978, potential hunter clientele were offered transportation (horses) and accommodation (tents or cabins and meals) for $100 per day.* This charge is less than the average cost of a guide in 1978 ($165 per day) and illustrates the pricing advantage held by packers in competing with guides for resident hunter clientele.

Although a packer cannot advertise hunts for particular game species, those big game species available in the area in which he operates are particularly important to his business. Resident hunters will not hire packers in order to hunt animals that are easily accessible or common throughout the province. Thus, packers are being hired by residents who wish to hunt thinhorn sheep, elk, goat and caribou, species that are usually difficult to reach for resident hunters. Many of these hunters are after trophy-sized animals.

There are no legal requirements regarding the quality of services that a packer provides, and the Fish and Wildlife Branch can take action against a packer only if there has been a violation of the Wildlife Act. Two factors, however, ensure that packers will attempt to provide high quality services. As described previously, the packer has to rely on his reputation for attracting clients. In addition, the Resident Wildlife and Tourist Association has developed a code of ethical standards for its members, much in the same way that the Western Guides and Outfitters Association has established standards of conduct for Guide Outfitters.

---

* *This was the figure noted by each of the three packers who responded to the questionnaire. Considering the sample size, the average rates charged by the industry as a whole, may be different.*

2.3 Services for Non-Hunters

In addition to competing with the guiding industry for resident hunters, the packing industry provides services for fishermen and other outdoor recreationists. Analysis of the three responses to the questionnaire indicates that this component of their business is smaller than the hunting component and consists of an average of 7.3 fishermen and 4.7 other recreationists per year in 1978 (as compared to an average 17.3 hunters per operation). The services provided to non-hunters are mainly limited to transportation and accommodation, but guiding for fish is allowed if the packer has obtained a Small Game and/or Angling Guide Licence. The cost to clients for these services ranged from $40 to $80 per day, depending on the packer involved, but averaged $55 per day for fishermen and $60 per day for others. June and July were noted to be the busiest months for providing services to non-hunters.

The three active packers responding to the questionnaire indicated that the demands for packing services by non-hunters are increasing. The eventual success of the packing industry may depend heavily on non-hunter clientele. Although existing regulations under the Wildlife Act effectively limit a packer's hunting clientele, there are no corresponding restrictions on non-hunting clientele. By purchasing a Small Game and/or Angling Guide Licence, the packer would then be able to offer exactly the same services to non-hunters (both residents and non-residents) as Guide Outfitters could offer. Packers could then compete more freely with guides for non-hunter clientele. Any changes in policy or regulation that might curtail the packer's non-hunting activities, or that might give the Guide Outfitter a competitive advantage, could seriously harm the packer's overall business and income. At this time it is not known whether any packers obtained a Small Game and/or Angling Guide Licence in 1978. Although none of those packers who responded to the questionnaire did purchase such a licence, all have suggested that to be able to purchase such a licence would improve their operations. Under provincial licencing policy there are no known obstacles that prevent a packer from obtaining a Small Game and/or Angling Guide's Licence. However, concern in Region 7 over packer-guide problems and uncertainty about regional fishing stocks has resulted in no Small Game and/or Angling Guide Licences being issued to known packers until such time as the position of the packer with respect to provincial wildlife management policies has been clearly established.

2.4 Clientele

The demand for packing services appears to have been inconsistent over the last few years. Although the number of resident hunters using packers is reported to have generally increased for the last five years, the number of non-hunters has changed considerably from year to year. As recorded by the three packers who replied to the questionnaire and who were active in 1978, their total number of clients over the last five years is summarized below:

Year	Hunters	Fishermen	Other	Total	Average
1978	52	22	14	88	29.3
1977	54	17	12	83	27.7
1976	44	40	34	116	38.7
1975	39	16	10	65	21.7
1974	36	18	12	66	22.0

It is not known what proportion of non-hunting clients were non-residents. In considering the future of the industry, all packers who responded felt that the demand for their services would increase for both hunters and non-hunters.

2.5 Size of Operations

Information about the size of packing operations is again limited to packers' responses from the questionnaire survey. Of the three packers active in 1978, the average number of clients per operation was 29.3 and there were 2.3 employees per operation in 1978. All three operations were quite similar in size, both in terms of clientele, number of employees and revenues received. Information from packers who did not operate in 1978 suggests, however, that this view of the industry may not be very accurate. One packer claimed to have had almost 100 clients in 1976 while the other who responded claimed to have had 750 clients in 1976. Such operations are probably few in number but are considerably bigger than guiding and other packing operations. Although these figures can be neither proven nor refuted, this information may hint at the actual size of the packing industry.

2.6 Characteristics of Packers

According to information received from the Resident Wildlife and Tourist Association, there are particular characteristics that determine who can operate a packing operation:

> You have to live close to the resource, own land on which to accommodate horses and have ranch-like living quarters to accommodate people, (which in most cases means no roads, no schools, no phones, etc.).*

Aside from these investments in transportation and accommodation, a successful packer must also have knowledge of how to pack and handle horses and be extremely familiar with the country in which he operates. This is essential for continued operation as a packer attracts most clients on the basis of a reputation for providing satisfactory services.

---

* *Brief submitted to Hon. Minister Sam Bawlf on behalf of the Resident Wildlife and Tourist Association (undated).*

As reported, the packers who operated in 1978 had an average of seven years of experience as packers. Also, many packers appear to have worked at one time or another in the guiding industry. All three packers worked as Assistant Guides for periods of time ranging from 3 and 18 years.

Packers rely on their packing activities for varying proportions of their total annual income. Those packers who responded to the questionnaire indicated that they received between 40% and 100% of their total incomes from their operations. Alternate sources of employment for those making less than 100% of their income from packing were primarily trapping and the operation of a lodge.

3.0 ECONOMICS OF PACKING

To date there has been no assessment of the total economic benefits (or costs) that accrue to the province as a result of the packing industry. The primary type of benefit would be the employment and income generated by the demands of resident hunters and other outdoor recreationists for packing services. Other employment and income benefits attributable to the packing industry may occur in other sectors of the economy due to packers purchasing goods and services in order to operate their businesses. As there is no way of determining or contacting all those packers who operated in 1978, it is impossible to even speculate on the aggregate economics of the industry.

To provide some idea of the scale of some packing businesses, the information contained in the questionnaires will be examined and summarized below. It must be remembered that the questionnaires returned are probably not representative of the industry. Those packers who did respond, depended on their packing activities for 40% to 100% of their total annual incomes in 1978. It is likely that the responses obtained came from the best organized and most serious packing operations. There is probably an equivalent proportion of packers who made less than 40% of their annual income from packing. Thus, the figures discussed below probably exaggerate the economics of a packing business.

3.1 Operating Revenues

The packing operations responding to questionnaires reported operating revenues of between $10,000 and $25,000 in 1978. The average was approximately $19,300.

It must be remembered that not all income came from resident hunters. Non-hunters accounted for between 60% and 100% of total packing revenues. It is not possible, however, to determine the exact proportion of income from hunters and non-hunters.

3.2 Operating Expenses

The principal operating expense for packers in 1967 was labour. The three packers who responded hired a total of seven people and reported paying $26,800 in labour costs. The average payment to employees was then about $3,800 for about twelve weeks work. Payments for labour constituted 56% of total operating expenses in 1978.

There is an important difference between the labour requirements of guides and packers. Due to the regulation limiting a guide to two hunters at a time, a Guide Outfitter will often hire more Assistant Guides in order to increase his annual business. No such regulation applies to packers. Therfore, packers require less help than do guides.

As with guides, packers also hire family members. All packers who replied to the questionnaire and operated in 1978 hired between one and three family members. Both status and non-status Indians were hired by packers. Of all those people employed by packing businesses, it was felt by the packers that almost half would not have had jobs elsewhere in the economy for the summer and fall.

The second greatest operating cost for packers in 1978 was reported to be repair and maintenance costs which averaged about $2,700 per packer and constituted 17% of total costs. The purchase of supplies represented an average cost of $2,600 per operation or 16% of annual operating costs. Payments to banks (in the form of interest charges) and to governments (in the form of taxes) cost each packer $900 in 1978. Other expenses incurred by packers amounted to $800. Total operating costs per packer were then estimated to have been $15,900.

3.3 Earnings

The difference between operating revenues and operating costs represents the earnings of each business. Using the estimates of revenue and cost provided by packers, the average earnings was calculated to have been about $3,400 per operation.

Earnings are spent in either of two ways:

a) in lieu of paying themselves a wage for their labour inputs to the business, business owners retain a proportion of the earnings; and/or,

b) a proportion of earnings are used to invest in new facilities or equipment to improve the business.

According to the packers who returned questionnaires, two of three invested money in excess of their earnings. Despite an average investment of about $8,400 per packer, packers still reported having retained between $2,000 and $15,000 as wages. There was no explanation given for this situation, however, packers may have borrowed money in order to make these investments or used income from other sources. Two packers reported having alternate sources of employment; trapping, in both cases. It would seem more likely then, that packers had to borrow money in order to make the investments indicated.

3.4 Investment

In keeping with the services they provide, the basic investment that a packer must make involves purchasing transportation and accommodation facilities. In most instances packers utilize horses for transportation and provide hunters with cabins and/or tents. However, a minority of packers have begun to use jet boats or airplanes to get resident hunters into suitable hunting areas. Such facilities require a much greater investment prior to commencing operations. Some packers also provide services other than accommodation and transport, including facilities for hanging and butchering meat and communications equipment.

Packers reported investing an average of $8,400 in their businesses in 1978. The types of investment made by packers over the last five years are summarized below:

Type of Investment	1978	1974-1977	Total
Buildings	$4,700 (56%)	$25,700 (60%)	$30,400 (59%)
Horses and Packing Equipment	1,800 (21%)	7,800 (18%)	9,600 (19%)
Camping Equipment	800 (10%)	3,100 (7%)	3,900 (8%)
Boats	-	300 (1%)	300 (1%)
Aircraft and Landing Facilities	800 (10%)	5,300 (12%)	6,100 (11%)
Other	300 (3%)	600 (2%)	900 (2%)
Total	$8,400	$42,800	$51,200

In comparison to the guiding industry, the three packers invested considerably less money in their businesses in 1978. Guides in Region 7 invested almost twice as much as did packers. The patterns of investment are, however, quite similar. The majority of investment moneys were spent on buildings. The purchase of aircraft and related facilities by packers was of less importance than for guides. Packers paid more attention to improving and expanding their supply of horses and packing and camping equipment. This would suggest that packers are concentrating their efforts to improve their basic facilities before acquiring the more sophisticated equipment being purchased by Guide Outfitters. As with guides, the value of investments may be underestimated by the extent to which packers have invested their own labour in making improvements to their equipment and facilities.

3.5 Regional Economic Impact

The extent to which regional economies benefit from packing operations is not known due to lack of information about the overall packing industry. Spending patterns as reported by a few packers indicate that nearly all (89%) purchases of supplies and other non-labour items occurred within the regional economy. In addition, almost all labour (84%) came from within the region. Thus, depending on the number and distribution of packing businesses, the regional employment and income benefits could be quite important.

4.0 CONCERNS OF THE PACKING INDUSTRY

The prime concern of the packing industry is its continued existence and viability. As the number of packers in operation has increased in recent years, opposition from members of the Western Guides and Outfitter's Association has been steadily growing. Aside from defining the distinctions between packing and guiding and indicating to packers the legal limits of their endeavours, the Fish and Wildlife Branch has held itself aloof from this growing controversy, and has not acted to resolve the uncertainty with which packers regard their future. Until such time as the Wildlife Act is amended to legitimize or eliminate the packers, uncertainty about the industry's future will continue to grow.

Guides and outfitters have a number of arguments against allowing the packers to continue operations. First, the guides feel that the distinctions between packers and guides are too subtle to warrant two separate industries with two vastly different sets of regulations and control. The guides claim that most packers assist in the hunt and are therefore violating the exclusive rights assigned to licenced guides. For this reason the Northern B.C. Guides Association posted a reward* for information leading to the conviction of anyone acting as a guide but not having a Guide Outfitter's or Assistant Guide's Licence. This action clearly illustrates the guiding industry's concern over the overlap between guide and packer.

A second argument concerns the restriction which limits the area in which a Guide Outfitter can operate. Under guiding regulations, guides are restricted to specified geographic areas, be they certificated territories or otherwise. As resident hunters are not restricted in most areas of the province (except in areas designated as Limited Entry Hunting zones), the packer is not restricted either. Thus, resident hunters accompanied by packers may hunt almost anywhere in the province, including within the territories of Guide Outfitters. In some instances, Guide Outfitters are claiming that packing operations violate the exclusive guiding rights granted by a Guide Outfitter's Certificate. The key to this controversy again relates to the definition of guiding vis-a-vis packing.

Given that both packers and guides still do operate, the guides argue that under existing regulations the packer has an unfair advantage over the guides in pursuing resident hunters as clients:

> Outfitters have and will continue to assist the resident to hunt or pack in his allotted area, so long as it is economically feasible. That is the key. Outfitters have very high expenses. They pay heavy taxes on land,

---

* *Alaska Highway News*, September 1977.

> range fees, royalties, etc. Wages are high due to seasonal employment and a large part of these wages end up in taxes.
>
> The so-called packer beats all of these expenses. He does not file reports, tax forms, unemployment insurance, compensation, etc. All dollars earned can be hidden. A packer can get away with as many people as he can load on horses, or in a boat, whereas the guide can legally hunt only two persons to a guide. The packer has no expenses on trails, cabins, wood supplies, etc., as the guide-outfitter cuts and maintains the trails, cabins, wood piles, range improvements and so on. The packer just helps himself.*

While there is no hard evidence to support these claims, it would appear that particular sections of the guiding regulations, those sections pertaining to licence fees and royalties, insurance requirements, performance criteria, and a maximum of two hunters per guide, do increase their operating costs relative to those of packers.

To these charges of discriminatory regulation of the industry, the packer argues that the guiding industry discriminates against resident hunters by its own actions. The fees that guides charge for their services are based on what a captive international clientele are prepared to pay, and these generally exceed what resident hunters consider reasonable. It is also claimed that resident hunters often get second class hunting trips with guides because the Guide Outfitter does not want the resident hunter to come back unaccompanied to hunt in the best parts of his territory in successive years. For these reasons, guides are seen by packers as favouring non-resident hunters while resident hunters must go to the packer to get affordable high quality hunting. As to the guides' operating costs being higher, the packers note that they do not invest in facilities because they have no territorial rights and have not got the security that a Certificate gives to a guide.

---

* *Western Guides and Outfitter's Association, Brief on Guide-Packer Situation, Submitted to the Honourable Sam Bawlf, Minister of Recreation and Conservation, May 11, 1977, pp. 1-2.*

These arguments do present a compelling case for legitimizing the packing industry in order to provide opportunities that resident hunters can afford. However, information received from resident hunters who hired guides (see Appendix C) suggests that these arguments may be based more on conjecture than fact. For instance, the average guide fees paid by resident hunters ($120 per day) were significantly lower than the average guide fees paid by non-resident hunters ($165 per day). This suggests that the international market price of a hunt does not always apply to resident hunters wishing to use guides. As to whether resident hunters get a poorer quality hunt than non-residents, resident hunters are accompanied by the Guide Outfitter much more often than are non-resident hunters who usually wind up hunting with a less experienced Assistant Guide.* In assessing the quality of their guided hunt, residents using guides were in general more satisfied than were non-residents. Thus, the packer's charge that Guide Outfitters discriminate against resident hunters does not appear to be justified.

Despite the arguments presented above, the major concern of the packing industry as suggested by the Resident Wildlife and Tourist Association, is to ensure that resident hunters and non-consumptive resource users get an opportunity to pursue wildlife at an affordable price. The packer is opposed to the idea that guides should hold a virtual monopoly of all guiding and outfitting activities in British Columbia for non-residents and resident hunters and non-consumptive resource users. Any attempts at further restricting the packing industry would be viewed as a reinforcement of these monopoly rights and discrimination against the resident hunter.

---

* *The guiding businesses that resident hunters used were typically larger businesses than average, hiring 4.8 Assistant Guides per operation compared to only 2.8 Assistants per operation for the entire industry.*

In order to gain recognition as a viable and legitimate industry and to prevent further "discrimination" against resident hunters, members of the Resident Wildlife and Tourist Association have suggested a number of changes in Fish and Wildlife Branch policies. A list of these suggested changes was contained in the questionnaire returned from each of the three packers active in 1978, and is itemized below:

1. The Fish and Wildlife Branch could recognize the Packing Industry and legalize them to guide B.C. Residents (and Canadian residents) should the resident so desire.
2. Leave the resident licence and tag system as it is. No quotas or draws until such time as the Resident game taken reaches 80% of the harvestable game of any given species.
3. It would be beneficial for qualified Packers to obtain "Permits" to build cabins at our base of operations to accommodate clients
4. To issue Fish and Small Game Guide licences to Packers. This is part of the Guiding Industry that has been neglected in our area of Northern B.C.
5. Revise the definition of "Guide" in the Wildlife Act. As the present definition is 'anyone assisting the hunter for remuneration is guiding' - so this does include Airlines, Hotels, Sporting Good Stores, etc.
6. Have the Fish and Wildlife Branch set up a test and standards to obtain a Packers licence. We are now under Federal jurisdiction with a trade licence that anyone can obtain.

While these suggestions prescribe the manner in which the packing industry could be legitimized, the most important question of whether the packing industry is needed and/or desirable, still remains to be answered.

5.0 CHARTER AIRLINES

In examining literature pertaining to the packing industry, it was suggested that some charter airlines fall into the category of "packer." Where a charter airline advertises to fly resident hunters into a hunting or fishing camp that is not run in association with either a Guide Outfitter or Small Game and/or Angling Guide, the offering of transportation and accommodation would constitute packing. To determine the extent of these activities, 32 questionnaires were sent to various charter airlines throughout the province. Of these, only eight questionnaires were returned. Based on these responses it would appear that charter airlines do not usually operate as packers, but only as carriers for established guiding and fish camp operations. No charter airline indicated that they assisted in the operation of the camps they serviced. Occassionally, individual hunters chartered planes in order to be flown into an individual spot but this does not constitute packing.

It is conceivable that other charter airlines do provide packing services but the extent to which this occurs is unknown. Only by more closely examining charter airline services would it be possible to determine whether the statement that charter airlines are operating packing services is correct.

V

COMMERCIAL FRESH WATER SPORTS FISHING OPERATIONS

1.0 INTRODUCTION

Any assessment of commercial enterprises that cater to the needs of freshwater anglers is complicated by a number of problems. First, there is some difficulty in defining exactly what types of commercial enterprises should be included in such a study, due to the wide variety of expenditures made by sports fishermen, both resident and non-resident. Second, there is no listing of such enterprises nor is there any licencing or other information that identifies all those operations that fall under any definition of fish camps or other relevant operations.

For the purposes of this study, we have defined commercial sport fishing enterprises as being those that depend directly on sports fisheries exploitation, including licenced fishing guides, fishing camps, resorts and lodges. We are not dealing with the many sporting goods stores in the province that sell fishing tackle or equipment, or those businesses that manufacture tackle and equipment.

To prepare a list of the most relevant sport fishing operations, a variety of sources were examined. Tourism British Columbia annually publishes a directory of tourist accommodation that contains a number of classifications, including:

> *Fishing Camp* Accommodation on lake, river, or sea used mainly by fishermen. May be in remote area and very basic in accommodation needs.
>
> *Fishing Resort* Offering a variety of specialization in fishing recreation. All services, boats, motors, guides and lodge-type accommodation. Freezing and smoking facilities for fish.

> May offer transportation. Differentiated from "fishing camp" mainly by offering rooms and lodge accommodation with indoor plumbing.

It is likely that many operations listed under other classifications, including trailerparks, campgrounds, and lodges, also qualify under the definition of commercial sport fishing enterprise, depending on the types of services provided. A list of these operations was prepared for each of the eight Tourism B.C. regions (see Map 2), and was then amended in consultation with the tourism coordinators of each region. Contact with the B.C. Interior Fish Camp Operators Association added to the list of fish camps. For Vancouver Island, tourism information was provided by the Victoria Daily Colonist.

A list of 414 possible commercial sport fishing enterprises were identified and subsequently contacted. Of these 35% were classified as fish camps and 31% were resorts and lodges. The other 34% were motels, trailer parks and other establishments offering services to anglers. These operations were distributed throughout the province as shown in Table 33. The majority of these operations were in the Central Interior, in an area generally approximating Resource Management Regions 3 and 5. Upon contacting these enterprises, however, it was found that only 320 (77%) of these operations relied on fishermen for more than 20% of their total annual incomes (see Table 37). On this basis, the other 94 operations have been excluded from the following assessment of the commercial sports fishing industry.

A second aspect of the industry to be studied is the role and importance of fresh water fishing guides. There are two types of guides to consider. First, in the course of being licenced to guide for game, a Guide Outfitter is also licenced to guide anglers within the area described on his licence. Thus a Guide Outfitter who has a Certificate is automatically licenced to guide fishermen in that territory, and a Guide Outfitter licenced in a guiding block can guide fishermen within that block. As noted in section 2.4 of Chapter III of this study, over half of all

British Columbia Tourist Regions

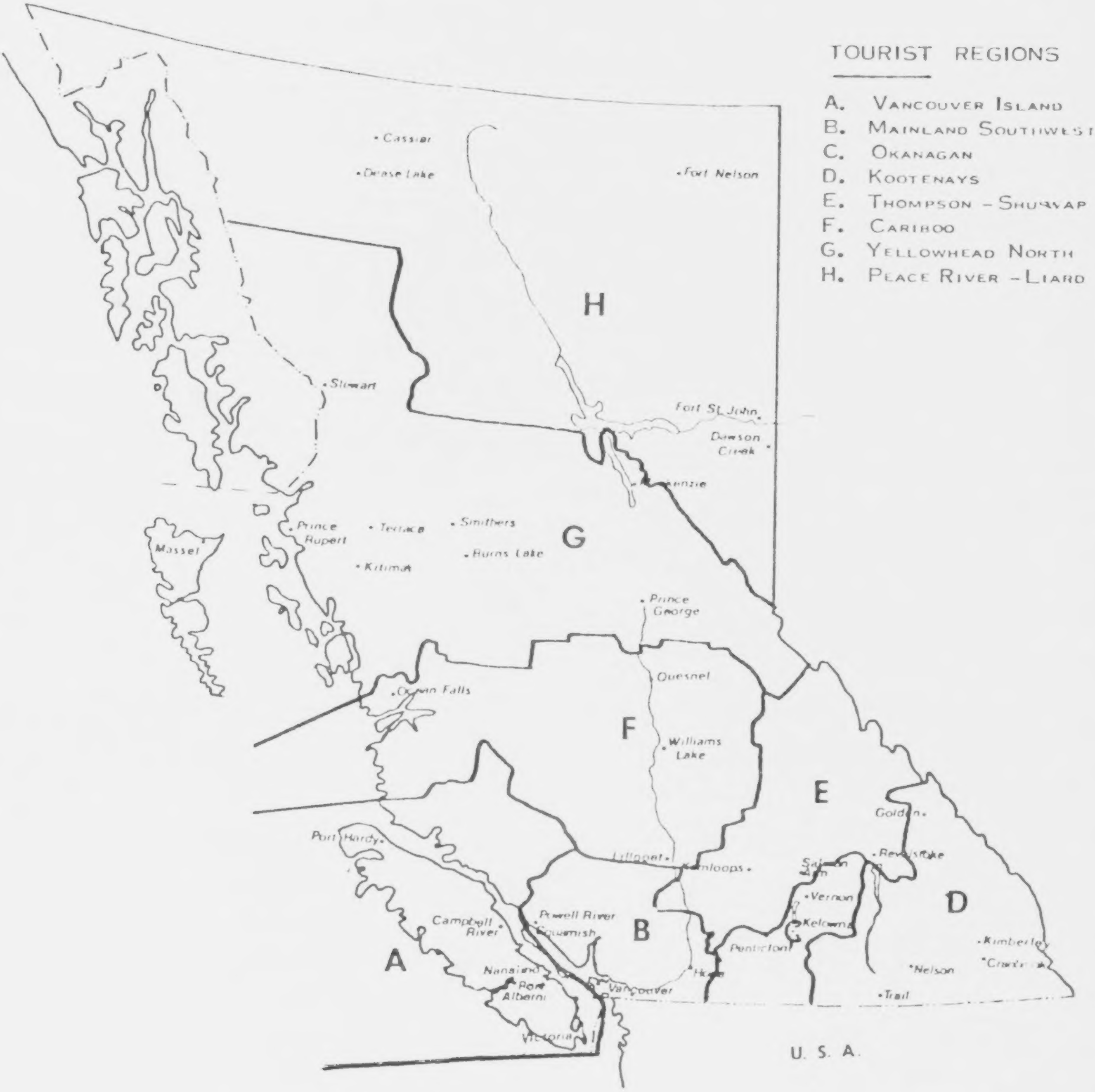

TOURIST REGIONS
A. VANCOUVER ISLAND
B. MAINLAND SOUTHWEST
C. OKANAGAN
D. KOOTENAYS
E. THOMPSON - SHUSWAP
F. CARIBOO
G. YELLOWHEAD NORTH
H. PEACE RIVER - LIARD
Cassiar
Dease Lake
Fort Nelson
H
Stewart
Fort St. John
Dawson Creek
Mackenzie
Prince Rupert
Terrace
Smithers
Burns Lake
Kitimat
Masset
G
Prince George
Quesnel
Ocean Falls
F
Williams Lake
E
Golden
Port Hardy
Lillooet
Kamloops
Salmon Arm
Revelstoke
Vernon
Kelowna
D
Campbell River
Powell River
Squamish
B
Penticton
Kimberley
A
Nanaimo
Port Alberni
Hope
Nelson
Cranbrook
Vancouver
Trail
Victoria
U. S. A.

TABLE 33

PROVINCIAL DISTRIBUTION OF PROBABLE COMMERCIAL SPORTS FISHING ENTERPRISES IN 1978

Tourism Region	Number of Fishing Camps	Number of Fishing Resorts	Other Relevant Operations	Total
Region A	0	23	0	23
Region B	1	5	12	18
Region C	12	0	14	26
Region D	2	9	35	46
Region E	48	31	33	112
Region F	50	38	20	108
Region G	20	17	24	61
Region H	11	6	3	20
Provincial Total	144	129	141	414

Guide Outfitters in the province in 1978 provided services to fishermen. Except for Guide Outfitters, any person wishing to guide sport fishermen in non-tidal waters must obtain a Small Game and/or Angling Licence. The fee for this licence is $15 and it entitles the holder to guide anglers or small game hunters,* anywhere in British Columbia. These licences are issued on application,** and no distinction is drawn as to the applicant's primary interest - small game or fish.

There is a need to comment on the position of the Guide Outfitter. He is automatically licenced to guide fishermen within the area for which his Guide Outfitter Licence is valid. If he wishes to guide fishermen outside that area, he must acquire a Small Game and/or Angling Licence. The Guide Outfitter does not have the exclusive right to guide fishermen within the area to which his Guide Outfitter Licence applies (Certificated Territory or Guiding Block), however, as any person holding a Small Game and/or Angling Licence may guide fishermen there as well.

Unfortunately, there is some overlap between the operations of fishing camps and resorts, and the activities of guides. Over half (55%) of all Small Game and/or Angling Guides in 1977 indicated that they worked for a fish camp and in 80% of these cases the camp was owned by the guide. Guide Outfitters also own and operate fish camps. In 1978, 60 fish camps employed or were owned by Guide Outfitters and/or Assistant Guides. As calculated in section 3.1 of Chapter III, Guide Outfitters may have received as much as $6 million from fishermen in 1978. These revenues are more aptly attributable to the fresh water sports fisheries and fish camp operations than to the big game guiding industry. The activities of Small Game and/or Angling Guides are explored in detail in section 6.0 but generally accounted for $211,940 in 1978.

---

* *Small game is defined to be all game other than big game. Big game species include cougar and wolf*

** *The only legal qualification being that the applicant must be 19 years of age or older, a Canadian citizen, and resident in British Columbia.*

2.0 TYPES OF SERVICES PROVIDED

Fish camps, resorts, lodges and other operations offer a wide variety of services to sports fishermen. The basic service provided is accommodation. In most cases this accommodation is in the form of housekeeping units (77% of all operations) and/or campsites (65%), but others provide lodge facilities (25%), trailerparks (32%), motel units (10%) and cabins (10%). The provision of food or meal services by fish camps is very limited. Some sell groceries (35%) and others provide restaurant (21%) and/or coffee shop services (12%). Only a few (5%) offer meals services under the American Plan (sleeping accommodation plus three meals).

In terms of specific services for fishermen, three out of every four operations offer boat rentals. Some provide launching facilities (60%) and some sell bait and tackle (55%) and marine gas (61%). More specialized facilities include smokehouses and freezer facilities for preserving or storing fish caught. Such features can be found at about 65% of all commercial sport fishing enterprises. Only a few camps offer licenced angling guides (29%) and fewer yet offer air charter facilities (10%) so that fishermen can gain access to more isolated fishing areas.

Access to most fish camps, resorts and lodges is by public road (80%). However, many camps are very isolated from main highways and can be reached only by private road (16%). Float planes can land and provide access to over half of the fresh water operations in the province while wheeled planes are limited to about 14% of all operations. Access by water is much less common, with about 27% of these camps being accessible by lake boating and 7% by river boat.

The majority of commercial sport fishing operations operate only in the summer months. Only 16% of all camps are open all year round. Most operations open in May, and in June 94% of them are in operation. After providing service in June, July, August, September and parts of October, most camps close for the winter. Some fish camps, resorts and lodges do remain open during the hunting season and provide services for hunters (42%) but the services are usually only accommodation.

One important factor in the operation of fish camps is the species of fish available in the surrounding area. Most operations are located close to lake fishing (90%) while only 40% are close to river fishing. Rainbow trout are by far the most important fresh water fish in British Columbia and most fishing camps (93%) are dependent upon them. Fishing for char species like Dolly Varden and lake trout is found in proximity to 33% and 32% (respectively) of all fish camps. Kokanee fishing opportunities are offered at 33% of all commercial sports fishing operations. One fishery of particular importance to parts of British Columbia is the salmon (coho and chinook) and steelhead fisheries in coastal rivers. About 19% of all fresh water sports fish operations in the province are located close to these rivers.

Other fresh water sports fish are found throughout the province but are less frequently found close to fish camps, resorts and lodges. Only between 5% and 20% of all lodges, resorts and camps list mountain whitefish, cutthroat trout, brook trout and grayling as being accessible sports fish species. Brown trout, northern pike, walleye and bass are found near fewer than 5% of all fish camp operations.

Another important factor that affects the viability of fish camps, resorts and lodges is the continued availablity of fish. Throughout the province, the Fish and Wildlife Branch has initiated a variety of programs and projects to increase or enhance fresh water sports fish populations, or to improve the quality of fishing. These programs have, in turn, directly affected fish camps. About 37% of all operations claim to have

TABLE 34

IMPACT OF FISH AND WILDLIFE BRANCH ACTIVITIES ON COMMERCIAL SPORT FISHERIES OPERATIONS IN 1978

Resource Management Region	Business Benefitted	Business Did Not Benefit	Undecided	Total
Vancouver Island	4	0	0	4
Lower Mainland	0	4	0	4
Thompson-Okanagan	66	79	6	151
Kootenay	15	9	0	24
Cariboo	44	31	13	88
Skeena	9	23	0	32
Omineca-Peace	6	9	2	17
Provincial Total	144	155	21	320
Percent of Total	45.0%	48.4%	6.6%	

benefitted from restocking programs, 17% benefitted from spawning facilities improvements, and 12% were located in areas where lake rehabilitation was undertaken. On the other hand, angling closures instituted for various reasons were felt to have adversely affected 19% of fish camps. Measures initiated to create a high quality fishery included posting of areas as a fly fishing only area (affecting 7% of all camps), a steelhead catch and release fishery (4% of camps), or a trophy fishery (4%). Special fishing licences were required on rivers and lakes located near 11% of fish camp operations. Overall, less than half of all fish camps in the province indicated that their business benefitted from Fish and Wildlife Branch activities (see Table 34); most of these camps were located in Resource Management Regions 3,4 and 5. Of the other 155 operations who did not benefit from Branch programs, most were located in the Skeena, Cariboo and Thompson-Okanagan Management Regions.

3.0 CLIENTELE

Although there is no way of determining how many resident or non-resident fishermen made use of fish camp operations each year, some general comments can be made. First, the potential clientele of fish camps is all those people purchasing fishing licences in any given year. As seen in Table 35, almost 90 thousand were non-residents. Over the last few years, however, the number of non-residents has remained relatively constant. Although non-residents comprise less than one quarter of all anglers in the province, they represent the majority of the clientele of fish camp operations. About half of all fishing camps reported receiving more than half of their income from non-residents, and 18% received more than 80% of their income from non-residents (Table 36). Thus, fish camps would appear to be heavily oriented toward non-residents and are a major source of tourism dollars. Despite lower numbers of non-resident fishermen, only a few fish camps (36%) have noted the proportion of their income from non-residents to have declined. Most camps

TABLE 35

SALE OF FISHING LICENCES 1974 to 1978

Basic Licences	1974-75	1975-76	1976-77	1977-78
Resident Licences:	269,827	280,840	290,030	299,688
Angling Licences	250,392	260,600	269,027	277,584
Senior Citizens	19,435	20,240	21,003	22,104
Non-Resident Licences:	91,183	88,645	87,014	89,817
Canadian	39,136	38,712	40,066	41,884
Non-Canadian	52,047	49,933	46,948	47,933
Total Basic Licences	361,010	369,485	377,044	389,505

Supplemental Licences				
Resident Licences:				
Steelhead	23,592	26,697	25,444	23,642
Non-Resident Licences:				
Steelhead	2,007	2,005	1,893	1,791
Special Rivers	1,028	1,135	999	1,056
Special Lakes	1,205	1,796	1,423	1,474
Total Supplemental Licences	27,832	31,683	29,759	27,963

TABLE 36

COMMERCIAL SPORTS FISHING OPERATIONS* PROPORTION OF INCOME FROM NON-RESIDENT FISHERMEN IN 1978

Resource Management Region	Proportion of Income from Non-Residents Under 20%	21% to 40%	41% to 60%	61% to 80%	Over 80%	Total
Vancouver Island	4	0	0	0	0	4
Lower Mainland	0	4	0	0	0	4
Thompson-Okanagan	0	56	43	26	26	151
Kootenay	0	8	4	4	8	24
Cariboo	14	23	23	14	14	88
Skeena	6	3	6	6	11	32
Omineca-Peace	0	4	4	9	0	17
Provincial Total	24	98	80	59	59	320

* *For the purposes of this study, only fishing camp operations making more than 20% of their total income from fishermen (both resident and non-resident) have been included in the analysis.*

(41%) noted an increase in revenues from non-residents over the last five years.

As to the quality of fishing as perceived by the fishermen, most fish camp operators (60%) suggested that non-residents were satisfied with the quality of fishing experiences within areas accessible from their fish camp operations. Except for the Lower Mainland Region, this trend was consistent throughout the province. In comparison, only half of fish camp operators felt that resident fishermen were satisfied with the quality of fishing.

4.0 ECONOMICS OF FISH CAMP OPERATIONS

4.1 Revenues

Although fish camp operations took in an average of about $26,400 each in 1978, not all that revenue is attributable to providing services to fishermen. Table 37 shows the distribution of fish camps among Resource Management Regions on the basis of the proportion of total income from fishermen. Of the 320 fish camps in the province, about half rely on fishermen for more than 80% of their total income.

In 1978, the gross income of the 320 fish camps is estimated to have been $8.45 million. Based on the information contained in Table 37, this would predict between $5.5 million and $7.1 million to have come from sports fishermen. Of this amount, between 42% and 62% is attributable to non-resident fishermen. This total income was distributed between Resource Management Regions in 1978 as follows:

TABLE 37

DISTRIBUTION OF COMMERCIAL SPORTS FISHING OPERATIONS BY RESOURCE MANAGEMENT REGION BY PROPORTION OF INCOME FROM FISHERMEN

Resource Management Region	*Proportion of Income from Fishermen* Under 20%*	21% to 40%	41% to 60%	61% to 80%	Over 80%	Total
Vancouver Island	0	0	0	4	0	4
Lower Mainland	9	4	0	0	0	13
Thompson-Okanagan	30	7	10	33	101	181
Kootenay	15	8	0	4	12	39
Cariboo	11	14	17	11	46	99
Skeena	3	0	6	0	26	35
Omineca-Peace	26	4	4	9	0	43
Provincial Total	94	37	37	61	185	414

* *Not considered to be commercial sports fishing operations in this analysis due to low income from fishermen.*

Resource Management Region	Income From Resident Fishermen	Income From Non-Resident Fishermen	Total Income
Vancouver Island	$45,020	$5,000	$71,455
Lower Mainland	$13,890	$5,950	$66,125
Thompson-Okanagan	$1,438,275	$1,616,290	$3,808,750
Kootenays	$134,560	$201,845	$504,610
Cariboo	$932,735	$859,415	$2,551,930
Skeena	$343,570	$476,895	$994,500
Omineca-Peace	$112,235	$142,165	$455,250
Provincial Total	$3,020,285	$3,307,560	$8,452,620

It should be noted that those "fish camps operations" that made less than 20% of their annual income from fishermen, and have consequently been excluded from this analysis, had a total estimated income of $3.81 million in 1978, of which 10% or $381 thousand is estimated to have come from fishermen.

Most of the total revenue received by fish camp operations comes from the provision of accommodation and other services as noted in section 2.0. However, a small but important source of revenue attributable to fishermen is the commission received by camps for the fishing licences they sell. Income from the sale of licences amounted to about $17,500 in 1978 or about 0.3% of all revenues from fishermen.

4.2 Operating Costs

In running a fish camp there are four major types of operating costs that arise. These include the costs of labour, supplies, repair and maintenance costs for existing equipment, and taxes and interest charges. While it is not possible to determine the proportion of these costs that arise from providing services to fishermen, a general assessment of operating costs can be made.

In 1978, the fishing camp industry employed some 905 people in both permanent and seasonal jobs. These jobs included chambermaids, waitresses, management personnel, fish guides and boat boys. Many camps (33%) hired no additional help. Others hired as many as sixty people. Labour costs, as shown in Table 38, were estimated to have been about $1.7 million, or about $1,900 per employee. There was a tremendous variation in labour costs among Regions, partly due to the type of operation (in terms of proportion of income from fishermen) and varying length of operating seasons, as summarized below:

Resource Management Region	Number of Employees	Average Labour Cost Per Employee
Vancouver Island	10	$1,375
Lower Mainland	35	$770
Thompson-Okanagan	300	$2,475
Kootenay	110	$1,135
Cariboo	310	$1,695
Skeena	70	$2,645
Omineca-Peace	70	$1,415
Provincial Total	905	$1,900

It is quite likely that these estimates of labour costs underestimate the actual value of labour inputs to camp operations. In addition to actual wages paid (noted above), room and board are often provided to employees and, if quantifiable, should be included as a cost of labour. Also, 57% of all camps, resorts and lodges employ family members who may not be "paid" for their labours. Family members may account for as many as 345 employees, or about 38% of all employees. This factor is of considerable importance in Regions 2, 3 and 4 where over 60% of operations are family businesses.

As well as employing family members, fish camps employ both status and non-status Indians. In 1978, there were estimated to have been 75 status and 90 non-status Indians employed in varying

TABLE 38

TOTAL AND AVERAGE OPERATING COSTS OF FISH CAMP OPERATIONS IN 1978 BY RESOURCE MANAGEMENT REGION

	Total and Average Operating Costs of Fish Camps					
Resource Management Region	Labour	Supplies	Repairs & Maintenace	Taxes & Interest	Other	Total
Vancouver Island	$13,770 ($3,445)	$10,200 ($2,550)	$5,700 ($1,425)	$12,180 ($3,045)	$5,570 ($1,390)	$47,420 ($11,855
Lower Mainland	$27,030 ($6,755)	$12,470 ($3,115)	$11,470 ($2,865)	$5,330 ($1,335)	$2,930 ($735)	$59,230 ($14,805)
Thompson-Okanagan	$743,220 ($4,920)	$776,465 ($5,140)	$399,260 ($2,645)	$473,680 ($3,135)	$504,965 ($3,345)	$2,897,590 ($19,190)
Kootenay	$124,800 ($5,200)	$103,105 ($4,295)	$64,670 ($2,695)	$58,760 ($2,450)	$62,700 ($2,610)	$414,035 ($17,250)
Cariboo	$525,560 ($5,970)	$499,565 ($5,675)	$243,015 ($2,760)	$294,505 ($3,345)	$260,210 ($2,955)	$1,822,855 ($20,715)
Skeena	$185,100 ($5,785)	$206,325 ($6,450)	$95,395 ($2,980)	$114,760 ($3,585)	$124,530 ($3,890)	$726,110 ($22,690)
Omineca-Peace	$99,125 ($5,830)	$74,790 ($4,400)	$35,840 ($2,110)	$57,365 ($3,375)	$24,430 ($1,435)	$291,550 ($17,150)
Provincial Total	$1,718,605	$1,682,920	$855,350	$1,016,580	$985,335	$6,258,790
Provincial Average	($5,370)	($5,260)	($2,675)	($3,175)	($3,080)	($19,560)
Percent of Total	27.5%	26.9%	13.7%	16.2%	15.7%	100%

capacities by the industry. Of the 905 employees it was suggested that 34.3% or 310 people would have been otherwise unemployed.

The annual cost of the supplies needed to operate fish camps represented expenditures of $1.68 million in 1978, or about 27% of total operating costs. Another $855 thousand was spent on repairs and maintenance costs. Payments to various governments in the form of taxes, and to banks in the form of interest charges represented $1.02 million. Other operating costs totalled $985 thousand and included advertising costs (for items such as brochures and promotional expeditions), fuel costs, and inventory costs.

4.3 Earnings

Earnings for the purposes of this study, are generally defined as the amount by which revenues exceed operating costs. While it is relatively easy to calculate industry earnings for 1978, it is not possible to determine the proportion of earnings attributable to fishermen. In total, commercial operations dependent on fresh water sports fisheries reported earnings of over $2.2 million.

Earnings are usually spent in either, or both, of two different ways. In some cases, camp owners and operators do not pay themselves a fixed salary but instead take a share of the company's earnings at the end of each year. Investment in other facilities (discussed in the following section) is accomplished by using the remaining earnings.

Fish camps, resorts, and lodges provide full time or seasonal employment for camp owners and operators; there were few operators (10%) who worked only part time. The majority (48%) of operators worked at their camps on a seasonal basis, yet over half of all operators (53%) had no other source of employment. Of those with other jobs, the most common occupations were teaching,

TABLE 39

FISH CAMP INDUSTRY EARNINGS IN 1978

Resource Management Region	Total Income	Operating Costs	Total Earnings
Vancouver Island	$71,455	$47,420	$24,035
Lower Mainland	$66,125	$59,230	$6,895
Thompson-Okanagan	$3,808,750	$2,897,590	$911,160
Kootenays	$504,610	$414,035	$90,575
Cariboo	$2,551,930	$1,822,855	$729,075
Skeena	$994,500	$726,110	$268,390
Omineca-Peace	$455,250	$291,550	$163,700
Provincial Total	$8,452,620	$6,258,790	$2,193,830

service industries, farming, guiding and/or trapping, and logging/ forestry. The importance to camp owners and operators of the income they receive from their camp operations varies among Regions (see Table 40). One third of camp operators, particularly in Regions 2, 3, 6 and 7, reported that less than 20% of their annual income came from their fishing camp businesses. At the opposite end of the scale, fish camp operations provided over 39% of the camp operators with more than 80% of their income. It is not clear, however, exactly what incomes camp owners and operators actually received from their enterprises. The proportion of earnings going to owners and operators is not known.

4.4 Investment

To improve or add to the facilities offered by fish camps, resorts and lodges, owners invested approximately $2.8 million in 1978. These investments are summarized in Table 41. The greatest proportion of this investment (35.3%) was spent on improving and constructing buildings. Another 30.9% was spent on purchasing vehicles for camp use. Lesser amounts were spent on boats and other types of investments (13.8% on each) while only about 3% was spent on docks or roads. Over half of these investments to improve facilities occurred in the Thompson-Okanagan Region. Investments in the Cariboo Region accounted for another 26% of the total.

The amount of money invested in 1978 is estimated to have been about 33% higher than the average investment in facilities over the past four years. Resort and camp operators invested about $8.3 million over the period from 1974 to 1977. In recent years the bulk of investment has gone to buildings, other investments, vehicles and boats (in that order). Again, 75% of all these investments occurred in the Thompson-Okanagan and Cariboo Regions. An average fish camp, then, would have had another $8,670 invested in 1978. Total investment over the last five years would then be about $34,745 per camp.

TABLE 40

PROPORTION OF INCOME RECEIVED BY FISH CAMP OPERATORS
FROM THEIR OPERATIONS IN 1978

Resource Management Region	Under 20%	21% to 40%	41% to 60%	61% to 80%	Over 80%
Vancouver Island	0	0	0	0	4
Lower Mainland	2	0	0	0	2
Thompson-Okanagan	38	9	15	27	62
Kootenay	9	0	3	3	9
Cariboo	26	3	13	5	41
Skeena	19	0	3	3	7
Omineca-Peace	10	3	0	2	2
Provincial Total	104	15	34	40	127
Percent of Total	33%	5%	11%	12%	39%

TABLE 41

TOTAL INVESTMENT IN FACILITIES BY FISH CAMPS IN 1978

Resource Management Region	Buildings	Boats	Docks	Roads	Vehicles	Other	Total
Vancouver Island	$14,560	$2,760	$880	$2,320	$3,120	$2,480	$26,120
Lower Mainland	$5,945	$2,115	$455	$1,315	$8,115	$455	$18,400
Thompson-Okanagan	$500,080	$193,675	$43,365	$41,610	$423,335	$201,455	$1,403,520
Kootenay	$68,680	$25,855	$5,800	$7,280	$62,815	$24,220	$194,650
Cariboo	$246,760	$101,635	$22,050	$20,880	$233,465	$96,530	$721,320
Skeena	$99,980	$45,930	$9,625	$5,385	$104,710	$48,050	$313,680
Omineca-Peace	$44,360	$11,695	$3,065	$6,765	$22,165	$7,980	$96,030
Provincial Total	$980,365	$383,665	$85,240	$85,555	$857,725	$381,170	$2,773,720
Percent of Total	35.3%	13.8%	3.1%	3.1%	30.9%	13.8%	

TABLE 42

EXISTING INVESTMENT IN FACILITIES BY FISH CAMPS, 1974-1977

Resource Management Region	Buildings	Boats	Docks	Roads	Vehicles	Other	Total
Vancouver Island	$55,160	$8,920	$1,720	$1,360	$10,080	$10,620	$87,860
Lower Mainland	$16,745	$27,430	$515	$4,285	$6,055	$36,570	$91,600
Thompson-Okanagan	$1,299,875	$559,465	$97,750	$219,290	$659,130	$1,116,855	$3,952,365
Kootenay	$160,220	$114,090	$12,145	$33,725	$85,935	$195,135	$601,250
Cariboo	$846,980	$337,855	$48,625	$110,450	$342,325	$631,490	$2,317,725
Skeena	$282,950	$117,650	$22,500	$51,735	$155,425	$258,020	$888,280
Omineca-Peace	$226,110	$53,250	$5,815	$7,460	$40,280	$71,610	$404,525
Provincial Total	$2,888,040	$1,218,660	$189,070	$428,305	$1,299,230	$2,320,300	$8,343,605

Since the completion of an earlier study of commercial fresh water sports fishing operations about ten years ago,* the amount of money invested in fish camps by non-Canadians seems to have decreased. At that time, it was suggested that about 82% of all investment in fish camps, resorts and lodges was from Canadian sources. While an equivalent estimate of Canadian ownership is not available for 1978, the following breakdown of fish camps according to the degree of Canadian ownership would suggest that even less foreign ownership exists now.

Extent of Canadian Ownership	Number of Camps
0-40%	5
41-60%	5
61-80%	3
81-99%	8
100%	299
	320

Foreign ownership, to the extent that it exists, is found predominantly in the Thompson-Okanagan, Kootenay and Cariboo Regions.

5.0 REGIONAL ECONOMIC IMPACTS

In terms of the provincial economy, a gross income of $8.45 million does not appear to make commercial fresh water sports fishing operations a very significant industry. However, in the areas of the province where most fish camps are found (particularly in the Thompson-Okanagan and Cariboo Regions), the commercial sports fishing industry is a major source of both employment and income.

The direct employment benefits of the industry have been explained in section 4.2. At least 905 jobs were created, the majority in the Thompson-Okanagan Region (300 jobs) and the Cariboo Region

---

* *See Chapter Five, The Value of Non-Resident Sport Fishing in British Columbia, Pearse Bowden Economic Consultants, 1970.*

(310 jobs). Of the people employed by fish camps, 34.3% or 310 of them probably would not have been employed elsewhere in the economy. Of the remaining 595 employees, it is not known how many left jobs elsewhere in the economy in order to work in the fishing camp industry. It is also not known how many jobs in the industry are directly dependent on the sport fishing component of the industry. If the number of jobs attributed to sport fishing activities is related to the proportion of total income received from fishermen, then some 680 jobs are estimated to have been created by the demand for sports fishing facilities. The income payments to these 680 people would have amounted to about $1.29 million in 1978. Of this, 85.0% would have been spent within the region (see Table 43), as opposed to outside the region.

Local expenditures on goods and services by fishing camp operations also created indirect employment and income in the industries that provide those goods and services. As seen in Table 43, about 86.5% of all expenditures on materials and supplies were made inside the regions in which camps are located. The extent to which these expenditures create employment is not known.

It should be mentioned that although the gross income of commercial camp operations amounted to $8.45 million, much of that income is simply transferred from one British Columbian resident (the fisherman) to another (the camp owner). Additions to provincial revenues occur only when non-residents spend money in the province. The amount spent by non-residents using fish camps is not known for sure, but could have been as much as $3.9 million in 1978.

6.0 SMALL GAME AND/OR ANGLING GUIDES

Small game and angling guides are a small but important component of the commercial sport fishing industry. Although the purpose of the licence is to allow B.C. residents to provide guiding

TABLE 43

LOCAL VERSUS NON-LOCAL SPENDING OF COMMERCIAL FRESH WATER SPORTS FISHING OPERATIONS IN B.C. IN 1978

Resource Management Region	*Expenditures on Local Labour*		*Expenditures on Local Goods & Services*		*Total Local Expenditures*	
	Amount	Proportion of Total Labour Costs	Amount	Proportion of Total Expenditures	Amount	Proportion of Total Expenditures
Vancouver Island	$10,615	77.1%	$20,505	95.5%	$31,120	88.3%
Lower Mainland	$16,975	62.8%	$18,700	69.6%	$35,675	66.2%
Thompson-Okanagan	$638,425	85.9%	$1,450,435	86.3%	$2,088,860	86.2%
Kootenays	$97,720	78.3%	$192,910	83.7%	$290,630	81.8%
Cariboo	$449,355	85.5%	$867,415	86.5%	$1,316,770	86.2%
Skeena	$168,625	91.1%	$378,935	88.9%	$547,560	89.6%
Omineca-Peace	$78,410	79.1%	$118,315	87.6%	$196,725	84.0%
Provincial Total	$1,460,125	85.0%	$3,047,215	86.5%	$4,507,340	86.0%

services for hunters of small game and anglers, the majority of licence holders (89%) guide anglers only. In 1977, 89 people purchased Small Game and/or Angling Guide Licences, and these people operated throughout the province as follows:

Resource Management Region	Number of Licenced Guides
Vancouver Island	11
Lower Mainland	7
Thompson-Okanagan	9
Kootenays	7
Cariboo	17
Skeena	29
Omineca-Peace	9
Provincial Total	89

Of these licence holders it is thought that 49 worked in association with fishing camps, particularly in Regions 3, 5, 6 and 7. As well, 9 Guide Outfitters purchased Small Game and/or Angling Guide Licences, as did 10 Assistant Guides. Thus, there is considerable overlap between angling guides and other parts of the industries dependent upon the province's fish and wildlife resources.

The number of small game and angling guides in the province has been steadily increasing since 1973. As noted in Table 44, licence sales increased to 102 in 1978, up from 89 the previous year. Of course, not all licenced guides are active each year, and in 1977 only 70% were recorded to have spent any time actually guiding. This would suggest 71 active guides in 1978. The distribution of these guides among Resource Management Regions is not yet known. For the purposes of determining the activities of angling guides in the province in 1978, it is assumed that licenced guides were distributed throughout the province in a manner similar to previous years.

TABLE 44

SALE OF SMALL GAME AND/OR ANGLING GUIDE LICENCES, 1970-1979

Year	Number	Value
1970-1971	69	$1,035
1971-1972	76	$1,140
1972-1973	56	$840
1973-1974	74	$1,110
1974-1975	73	$1,095
1975-1976	81	$1,215
1976-1977	79	$1,185
1977-1978	89	$1,325
1978-1979	102	$1,530

Source: Fish and Wildlife Branch, Summary of Revenue Derived from Various Licences, Collections, Etc.

Small game and angling guides provide a variety of services to hunters and fishermen. In addition to guiding services, some provide meals (57%) and some provide fishing gear (60%). Some guides (40%) provide transportation services to and from the fishing sites. Even accommodation can be provided by guides (23%). Hunters get essentially the same services as those offered to fishermen.

The fishing opportunities offered by angling guides are quite varied. In the Cariboo and Vancouver Island Regions, the vast majority (over 80%) of guides assist fishermen wishing to catch steelhead. On a provincial basis, however, only 53% of angling guides cater to steelhead fishermen with 67% provide opportunities for other fresh water sport fish species. Of these groups 19% take out both steelhead fishermen and fishermen after other species.

The majority of people hiring angling guides are non-Canadians. Of all the people guided by small game and angling guides during 1978, 62% were from outside Canada, 15% were Canadians from outside British Columbia, and the remaining 23% were British Columbians (see Table 45). As was the case with fish camps, the Cariboo and Thompson-Okanagan Regions were among the most important regions for guided fishing activities. The Skeena Region was also heavily used by guided fishermen (23.4% of the total).

Guiding for small game was of little importance in comparison to guiding fishermen. Only 11% of all licenced small game and angling guides were allowed under the conditions of the Licence to guide for small game and in 1978 only half of these guides actually took out hunters. It is estimated that 44 hunters hired licenced guides in order to hunt small game. Of these 15 were from British Columbia, 5 were Canadians from outside B.C., and 24 were non-Canadians.

TABLE 45

SUMMARY OF SMALL GAME AND/OR ANGLING GUIDE ACTIVITY IN BRITISH COLUMBIA IN 1978

Resource Management Region	Number of Small Game/ Angling Guides	British Columbians	Canadians	Non-Canadians	Total	Average Fishermen Per Guide
Vancouver Island	13	8	3	5	16	1.2
Lower Mainland	8	60	4	0	64	8.0
Thompson-Okanagan	10	25	50	270	345	34.5
Kootenay	8	0	16	48	64	8.0
Cariboo	20	162	127	513	802	40.1
Skeena	33	83	40	347	[illegible]	14.2
Omineca-Peace	10	117	67	67	251	25.1
Provincial Total	102	455	307	1,250	2,012	19.7

The importance of small game and angling guide activities depends upon the individuals involved. In 1978, some guides actually guided for as many as 120 days although the average was closer to 28 days per year. Some angling guides relied on fishermen for over 80% of their annual income while the majority (64%) made less than 20% of their total income from their guiding activities.

PROPORTION OF SMALL GAME AND ANGLING GUIDES' TOTAL ANNUAL INCOME

ATTRIBUTABLE TO GUIDED FISHERMEN IN 1978

Resource Management Region	Under 20%	21% to 40%	41% to 60%	61% to 80%	Over 80%	Total
Vancouver Island	13					13
Lower Mainland	8					8
Thompson-Okanagan	4	3			3	10
Kootenay	8					8
Cariboo	5			8	7	20
Skeena	17	12		4		33
Omineca-Peace	10					10
Provincial Total	65	15	0	12	10	102

Guiding income received by guides in the Cariboo Region was a significantly greater part of their total annual income than for guides anywhere else in the province.

In 1978 small game and angling guides charged anywhere between $25 and $150 per day for their guiding services. At these rates, the estimated income from guiding fishermen amounted to $212 thousand as summarized below:

Resource Management Region	Number of Guides	*Income From Guiding*		*Days Spent Guiding*		Average Income Per Day
		Average	Total	Average	Total	
Vancouver Island	13	$190	$2,470	3.4	44	$56.14
Lower Mainland	8	$463	$3,705	12.5	100	$37.04
Thompson-Okanagan	10	$2,078	$20,780	50.7	507	$40.99
Kootenay	8	$1,600	$12,800	20.0	160	$80.00
Cariboo	20	$5,157	$103,140	42.9	984	$104.82
Skeena	33	$1,865	$61,545	27.5	910	$67.82
Omineca-Peace	10	$750	$7,500	15.0	150	$50.00
Provincial Total	102	$2,080	$211,940	28.0	2,855	$74.23

Guides in the Cariboo Region charged higher rates for their services and accounted for about 49% of all income received by angling guides. The main reason that charges in the Cariboo Region are higher than elsewhere, is that angling guides catering to steelhead fishermen have incomes from guiding that are 28% higher than other angling guides, and most steelhead guides are found in the Cariboo Region.

Although guiding fishermen represents only seasonal or part time employment for most small game and angling guides, for some it is their only occupation. For 1978, 18.4% of licenced guides indicated that they had no other employment and another 10.5% had otherwise retired from the labour force. Of those guides who had other jobs, 32.3% were employed as big game guides, fish camp operators or trappers. Other guides had regular jobs in sales-related industries (9.7%), logging and forestry (9.7%), service industries (6.5%) and construction (6.5%). Of those guides having a regular source of employment, the number who actually gave up employment income in other jobs in order to guide is not known.

Income received from guiding hunters after small game usually represents less than 40% of the total annual income of those guides. Average income from hunters was $1,690 per small game guide in 1978, for an average of 29 days work. For the industry

TABLE 46

TOTAL AND AVERAGE INVESTMENTS OF SMALL GAME AND ANGLING GUIDES WHO OPERATE INDEPENDENTLY OF FISH CAMPS, RESORTS OR LODGES

Resource Management Region	Number of Independent Guides	Buildings	Boats	Other Equipment	Docks	Roads	Vehicles	Other	Total
Vancouver Island	10	$3,000 ($300)	$28,000 ($2,850)	$3,380 ($338)		$250 ($25)	$87,500 ($8,750)		$122,630 ($12,263)
Lower Mainland	8		$23,200 ($2,900)	$3,800 ($475)			$41,000 ($5,125)	$1,040 ($130)	$69,040 ($8,630)
Thompson-Okanagan	3	$9,000 ($3,000)	$59,400 ($19,800)	$2,550 ($850)		$2,100 ($700)	$11,100 ($3,700)		$84,150 ($28,050)
Kootenay	8								
Cariboo	9		$11,100 ($1,233)	$3,300 ($367)	$2,400 ($267)	$600 ($67)	$10,800 ($1,200)	$7,200 ($800)	$35,400 ($3,934)
Skeena	14	$9,333 ($667)	$175,000 ($12,500)	$24,733 ($1,767)			$46,667 ($3,333)		$255,733 ($18,267)
Omineca-Peace	3								
Provincial Total	47	$21,333 ($454)	$297,200 ($6,323)	$37,763 ($803)	$2,400 ($51)	$2,950 ($63)	$197,067 ($4,193)	$8,240 ($175)	$566,953 ($12,063)

this would have resulted in total earnings of $10,140 from hunters in 1978. The average daily earnings of small game guides ($58.28) was well below the average daily income of angling guides.

The amount of investment made by guides to develop their businesses is relatively low because more than half of all angling guides worked in association with either a fishing camp or Guide-Outfitter. Angling guides who operate independently have invested an average of $12,060 in their operations in recent years, while an average fish camp had invested $33,330 over the last five years. Angling guides invested over half (52.4%) of their monies in purchasing boats and motors for their business. Investments in vehicles represented another 34.8% of total investment. Very little money was spent to improve or construct roads or docks. As most independent operators were found in the Skeena and Vancouver Island Regions, most of the investment occurred in these two Regions (45.1% and 21.6%, respectively). Another 14.8% of total investment by independent angling guides was made in the Thompson-Okanagan Region. Very little investment occurred in other Regions, particularly the Kootenay and Omineca-Peace areas of the province. It should be noted that the figures representing investment expenditures are estimates made by the guides themselves of the amount of money they have spent over the last few years. The present worth of these facilities is not known.

7.0 SUMMARY

Of the 414 enterprises that offered services to the fresh water sports fisherman in 1978, some 320 operations qualified as fish camps under the criteria of having more than 20% of their income attributable to fishermen. Most of these camps are located in the Thompson-Okanagan and Cariboo Regions of the province.

The total income of fish camps in 1978 was about $8.45 million of which $3.31 million came from non-resident fishermen. Angling guides working independently of fish camp operations enjoyed another $110,125 in income from fishermen.

Fish camps employed approximately 905 people in both permanent and seasonal jobs. Another 47 angling guides operated independently of these camps. Total employment directly attributable to the demands of fishermen is estimated to have been 733 people to which some $1.40 million was paid in wages. Additional employment benefits were created in other sectors of the economy through the purchase of $3.52 million worth of goods and services by fish camp operators.

In recent years, camp operators have invested large amounts of money to improve their facilities. Investment by fish camp operators totalled $11.1 million over the last five years and independent angling guides invested an additional $0.6 million. Of these investments only a very small proportion is from non-Canadian sources.

VI

POLICY APPLICATIONS

This study is not a policy analysis, nor was it intended to be. There are two reasons for this. First, the kind of information sought in the course of the study is basic documentation of the status of a number of important aspects of fish and wildlife utilization. This is information which is valuable input to policy analysis, and which can be applied to such analysis by all interested parties. However, the collection and presentation of the information does not in itself lead to any policy prescriptions. Second, as this study has been in progress a Commission of Inquiry into some aspects of the guide/outfitter industry has been underway. Two interim reports by Judge J.L. McCarthy were completed in June 1978, and a third report, expected to include policy recommendations, is forthcoming. For these reasons, then, the focus of this report has been limited to the collection and presentation of data.

Despite the intent that this not be a policy document, some observations on the policy applications of the information are appropriate. To begin with there appear to be two distinct applications of this material to resource management programs in British Columbia. One can be categorized as "internal" to the management of fish and wildlife resources, the other as dealing with the "external" relations between fish and wildlife management and other resource activities.

1.0 INTERNAL MANAGEMENT ISSUES

Like other resources, allocation and management issues for fish and wildlife are keyed to considerations of supply and demand. As a renewable resource, there is a given stock of fish or wildlife, with an annual "production" that is available for harvest at any point in time. The demand for available harvests* may exceed the supply - giving rise to a need for a rationing mechanism if fish and wildlife populations are to be maintained. And if the demand comes from more than one user "population" - residents and non-residents of British Columbia, for example - a rationing mechanism which can discriminate between populations is required. Demand from competing "user" populations exists for both sports fish and wildlife at the present time, although the demands tend to be more directly competitive in the case of wildlife, particularly for the more rare trophy species.

There has never been an explicit policy on the division of the available game harvest, or hunting opportunities, between residents and non-residents. The general policy has been to give the resident hunter unrestricted access, and can be seen as leaving the non-resident in a "residual" position. There is little doubt that over time residents will, by their presence in the field, and by their growing demands on the available harvest, drive out the discriminating non-resident. Still, at any point in time residents and non-residents may be competing for opportunities, as the displacement process is at work. A need exists, therefore, to both determine what proportion of hunting opportunities should be available to non-residents, and to ration those opportunities among interested parties.

---

* *We acknowledge, but do not address, demands for non-consumptive utilization which may reduce the share of annual production available to be harvested - a consideration more germane to wildlife than to fish.*

The former question is not likely to be resolved by any more explicit policy than has been formulated in the past. Given this somewhat indefinite basis on which non-residents are allowed access to the resource, this report has reviewed the regulatory frameworks that apply to the non-resident hunter and the guiding industry in British Columbia. Even with these regulations, however, conflicts between resident and non-resident hunters, and packers and guides still exist. Considering that the demands of both resident and non-resident hunters for the more highly prized trophy species are expected to grow, and that the supply of such hunting opportunities cannot be expanded appreciably, some additional or more sophisticated rationing mechanisms will have to be developed.

An economic approach to allocation of fish and wildlife resources among competing user groups would involve allocation on the basis of the net returns realized by British Columbia from each user group. Fishing and hunting opportunities would be allocated among groups so as to maximize the overall net return to the province. If such an approach were to be adopted, it would be necessary to compare the economic benefits generated by resident and non-resident users. As summarized in this report, the returns from non-resident hunters come in the form of licence fees ($1.22 million in 1977/78), payments to guides ($5.76 million) and purchases of other goods and services ($2.08 million). Although operating costs must be deducted from the revenues of the guiding industry in order to determine the net gain to the provincial economy, a large component of these costs are payments to labour having a relatively low opportunity cost. Thus, economic benefits to the province from non-resident hunters include considerable income and employment creation, particularly in some of the more remote regions. On the other hand, the "returns" from resident hunting come in the form of non-priced recreation benefits as well as from licence fees and hunter expenditures. Such benefits, though recognized to exist, are less tangible and cannot be measured in terms of additions to the provincial economy. Thus, a comparison of resident versus non-resident hunting cannot easily be made due to the different type of net returns to the province from each type of use.

Even when the net gains to the province from resident and non-resident hunters have been calculated, aggregate data for the province as a whole will seldom be adequate for management purposes. To develop adequate policies, data would have to be applied on the basis of identifiable geographic areas, and perhaps by wildlife species within an area. This report clearly cannot begin to carry out those kinds of analyses, but it begins to provide the necessary data for policy formulation dealing with such matters.

2.0 EXTERNAL MANAGEMENT ISSUES

The second application of the information provided in this report to resource management programs deals with the external relations between fish and wildlife and other resource activities. The principles here are the same as when attempting to allocate given fish and wildlife opportunities among competing demands, but the question is often whether the fish and wildlife opportunities can or should continue to be made available. This problem is particularly important considering that many types of resource development preclude maintenance of fish and wildlife populations.

Again there are a number of possible policy approaches to such issues, including the development of operating standards for extractive industries, allocation on the basis of land capability classification, and so forth. Most of these will not serve the overall public interest well, however, for by their technical nature they fail to take account of the strength of the relative demands for the resource opportunities and the representative values which accrue to society.

One approach to the resolution of conflicting demands is to base decisions on the net returns to British Columbia from each alternative use and to select the combination of uses, or single use, which yields the highest net return. When dealing with the present and potential values from fish and wildlife resources this presupposes some resolution of the previous question regarding the appropriate allocation between competing resident and non-resident user groups. Assuming such an allocation has been made, information from this report dealing with the commercial values from fish and wildlife exploitation, and from previous reports dealing with non-priced recreational values can be combined for comparison with potential values from other resource activities. This can be used both in basic resource allocation decisions, and in analysis of the efficacy of mitigation or compensation proposals. It is recognized that the direct evaluation techniques do not encompass all of the values associated with use of fish and wildlife resources, (they do not deal with such things as option value, "preservation" demand, and related concepts), but where only marginal changes in stocks are concerned the omissions tend to be of little consequence. In any case, the values reported in this study, which are from commercial activities, can be considered to be comprehensive.

3.0 NON-RESIDENT LICENCE FEES

The information presented in this report allows those responsible for policy formulation in the past, and those contemplating policy changes in the future, to gauge to some extent the implications of what they are doing. It also sheds some light on the related questions of "Was it worth it?" or "Will it be worth it?" What emerges from these kinds of questions is the realization that sometimes uniform province-wide policies tend to be very blunt instruments which may achieve their goals in some areas, at the same time that they over-achieve or under-achieve in other areas. An example of this can be found by looking at the effect of revisions made in 1974 to the licencing of non-resident hunters.

In managing non-resident hunting and fishing, general policy toward non-resident recreationists appears to have the dual goals of extracting from non-residents, through licence fees, what they are willing to pay for the resource opportunities available, while at the same time not wishing to reduce the non-resident presence in the province drastically because of their general contribution to the tourism and travel industry. When setting the levels of direct charges for access to fish and wildlife opportunities, implicit trade-offs will always have to be made between direct government revenues, employment opportunities and income in enterprises catering to such users, and the demands of the resident recreationist.

When the new system of licence fees for non-resident hunters was introduced in 1974, the increased charges were part of an overall reform in the policy toward non-resident hunters and the guiding industry. Increased licence costs were introduced in response to the realization that British Columbia's charges for such opportunities were very low in relation to what hunters were apparently willing to pay for hunting, and for some game species in particular. Whereas in 1973 the average non-resident spent only $34 on his basic licence and species tags prior to his hunt, and only $84 on trophy fees which depended on the actual game taken (see Table 46), under the revised system introduced in 1974 the average non-resident paid $263 for the basic hunting licence and individual species licences, while trophy fees were eliminated. These increased licence fees plus the procedure whereby all Crown charges were levied at the outset of the hunting trip obviously dissuaded some non-residents from hunting in British Columbia, and as can be seen, the demand for hunting by non-residents decreased by 30 percent between 1973 and 1974. The overall impact of the revised licence system meant an increase

TABLE 47

COMPARISON OF NON-RESIDENT HUNTER LICENCING SCHEMES USED IN BRITISH COLUMBIA IN 1973/74 AND 1974/75

	1973/74 Season	1974/75 Season	Amount of Change
Number of licenced non-resident hunters[1]	7,005	4,879	-2,126
Number of active non-resident hunters[2]	5,914	3,925	-1,989
Average cost of hunting licence per hunter[1]	$34.52	$262.62	+$228.10
Average cost of trophy fee per hunter[1]	$42.60	-	-$42.60
Average licence and trophy cost per hunter	$77.12	$262.62	+$185.50
Total licence revenues	$540,217	$1,281,310	+$741,093
Non-resident hunter spending[3]	$10,409,430	$7,949,440	-$2,459,990
Combined benefits to province	$10,949,647	$9,230,750	-$1,718,897
Number of active Guide Outfitters[2]	399	388	-11
Number of active Assistant Guides[2]	958	808	-150
Total Guides	1,357	1,196	-161

---

[1] *B.C. Department of Recreation and Conservation, Annual Report, 1974.*

[2] *Fish and Wildlife Branch, Summary of Guided Hunter Activity, 1973-74 and 1974-75.*

[3] *Non-resident expenditures based on average expenditure per hunter as predicted by averages for 1973/74 and 1974/75 derived using observed data for 1966 (Bowden and Pearse, 1968) and 1977 (this report).*

in direct government revenues of over $740 thousand, but this was offset by the loss of about $2.5 million in hunter spending experienced by the guiding industry and other businesses. In addition, there were 161 fewer Guide Outfitters and Assistant Guides in operation in 1974. In retrospect, the question which arises is whether the direct revenue gains from the revised licence structure were a worthwhile gain in comparison with the losses in business opportunities in the guiding industry. A similar situation is alleged to have occurred following changes in sports fishing licence fees and the introduction of "trophy" lakes and rivers for which special licences are required, although the data do not reveal these relationships as clearly.

For some species and in some areas, the revised licence fees were probably effective in capturing for the Crown the full willingness of non-residents to pay for opportunities to hunt. But for some areas licence charges were obviously excessive, leading to a decline in non-resident activity. In still other areas it is obvious that they were insufficient to capture the full willingness to pay. This is reflected in the information provided by Guide-Outfitters which indicates that in Resource Management Regions 6 and 7, an additional fee, ranging from $100 to $1200, may be charged if an animal is actually killed (grizzly, mountain goat, mountain sheep, moose). It is clear from this that non-residents hunting in these Regions are willing to pay higher direct charges for the available hunting opportunities and harvests, and the Guide Outfitter appears to be capturing this willingness to pay in lieu of the Crown. Further evidence that the Crown is not capturing the full resource value in the charges levied on non-resident hunters in these Regions is found in the high prices reported to have been paid for some guiding businesses. It appears that a good part of the price is in excess of the value of either assets or good will and must reflect in part, continued expectations to capture resource values which are not being charged for by the Crown.

A second impact of the revised licencing system for non-resident hunters is suggested by changes in hunter success rates. Under the pre-1974 system of trophy fees, non-resident hunters only paid for the animals actually harvested. Trophy hunters took only the largest animals and were prepared to wait until the best opportunity presented itself. After 1974, however, the incentives of non-resident hunters changed, as they were not prepared to pay the significantly higher fees for just the chance of finding a trophy animal. As a result, some hunters have probably taken smaller animals in order to justify the higher costs they were paying. Hunter success rates have improved, yet hunter satisfaction may well have declined.

These apparent results of the present licencing system, in effect for some five years now, suggest that there is the need and opportunity for a review of the system as it relates to the goals of (a) capturing willingness-to-pay in terms of direct fees to the Crown, and (b) providing a basis of support for the guiding industry. As regards the first goal of more fully capturing resource values, raising fees on a province-wide basis could well result in an overall net loss in Crown revenues, due to the reduction of demand for some species in some areas. The point is that while big game species may be the same (more or less) in different areas of the province, the ease with which they may be taken, the combination of other species with which they may be taken, or just the general aesthetics of the hunting experience, may differ markedly. This suggests the need for a varied system of charges which takes account of such differences and allows the Crown to appropriate resource values on a more discrete basis. Precedent of this sort has already been set in the case of sport fishing opportunities, where province-wide licence fees are supplemented by the special trophy lake or river charges where resource quality warrants or where there is a desire to reduce competition between residents and non-residents.

Additionally, there are clear indications that in levying charges, two components of a non-resident hunter's willingness-to-pay should be considered. These are the willingness-to-pay for the opportunity to hunt a certain species and the option of taking it (now captured by the species licence), and the further willingness-to-pay for successful harvest of an animal (now apparently captured by some guides as bonus payments). It may well be that lowering the initial charge for the opportunity to hunt (the species licence) and re-introducing a charge for actually taking an animal (the former trophy fee) would result in an increased direct return to the Crown from the same level of game harvested. And this could even lessen the harvest of some species, by reducing the pressure to take an animal, as previously noted.

A more discrete series of direct charges levied by the Crown on non-resident hunters might also further the second goal, support of the guiding industry, if the number of non-resident hunters increased as a result. This would most likely be manifested by an increased demand in "marginal" areas or areas of lower overall quality - those areas first abandoned by non-resident hunters in response to the increased licence fee and the "front end" nature of the charges. Similar considerations could well be applied to extending the present system of charges dealing with non-resident sport fishermen, although the basis on which "trophy" fees should be levied - the reported size of a fish or its actual size - would have to be carefully considered.

The data presented in this report provide a fertile ground for consideration of ways in which these policies toward allocation of fish and wildlife resources and the licensing of non-resident hunters and fishermen could be extended and improved.

APPENDIX A

TERMS OF REFERENCE

PART I - FEASIBILITY

The objective of the study is to improve knowledge of the economic aspects of commercial uses of fish and wildlife in British Columbia. This is desired for the formulation of resource management policy. The study will provide required knowledge through a review of the regulatory framework which presently governs the operation of big game guiding enterprises and fishing camps, and through a review of available information on the structure and economic performance of established operations. Previous reports dealing with these activities within British Columbia will be reviewed, as well as published information from other jurisdictions. In coordination with the Client, meetings will be held with representatives of the fishing camp operators and guide/outfitters to review the findings of the investigation and to determine the need for more up-to-date and first-hand information from those who are presently providing commercial services in this area, and from their clients. In the event that acquisition of such further information appears desirable, recommendations will be made as to the most effective means of acquisition.

A report will be issued at the completion of the above work which would summarize present knowledge of operations in British Columbia, information and data requirements for management and policy formulation, and set out a specific proposal for data acquisition should that appear necessary. Circulation of this report would be restricted to the Client.

PART II - DATA COLLECTION, ANALYSIS AND REPORT PREPARATION

For both fishing camp operators and guide-outfitters it can be anticipated that Phase One will identify the need to be better informed on the economic and social significance of these operations so that the effects of management and policy decisions on the operators, and on the derived benefits to British Columbia, are more clearly understood.

Work undertaken in Phase Two would include the design of questionnaires and data collection methods for fishing camp operators and guide-outfitters, and also the design of questionnaires to collect relevant information from their clients. It is anticipated that a mail-out questionnaire would be used in most aspects of data collection and this phase of the study would terminate when sufficient responses had been received to permit meaningful analysis of the data.

The final phase of the study would encompass data analysis and report preparation. Data collected from fishing camp operators, guide-outfitters, and their clients would be analyzed and a Draft Report submitted to the Fish and Wildlife Branch. The report would detail the economic implications of the operations of fishing camps and guide-outfitters in terms of the district economies of their operations, the income which they attract to British Columbia, and how that income is distributed between payments for labour, materials and supplies, and direct and indirect government revenues. The implications of changes in resource management policy would be explored from the point of view of the potential impacts on operators, and the regional economics of the province, and on provincial government revenues and expenditures. Opportunities to enhance the benefits to the province from these forms of exploitation of the fish and wildlife resource would be identified.

This draft Report would be reviewed by the Fish and Wildlife Branch before revisions and submission of a final report. Thirty copies of a typewritten report would be submitted.

APPENDIX B

DATA COLLECTION AND ANALYSIS METHODS

To accumulate the data necessary for a study of this kind, a major questionnaire survey program was undertaken. In total, eight different groups of people who depend in some way on the commercial use of fish and wildlife resources, were identified and subsequently contacted. These groups were:

1. Guide Outfitters
2. Assistant Guides
3. Non-resident Hunters
4. Resident Hunters who used Guides
5. Packers
6. Charter Airlines providing Packing Services
7. Operators of Fish Camps
8. Small Game and/or Angling Guides

For each group, the process of data collection was the same, although the sampling methods used and the questions asked were completely different. The process of data collection required two steps. First, a list of all possible recipients of questionnaires was developed by contact with the following information sources: the Fish and Wildlife Branch, Tourism British Columbia, Western Guides and Outfitters Association, Resident Wildlife and Tourist Association, and the B.C. Interior Fish Camp Operators Association.

The second step involved the design of questionnaires for each different group. (A copy of each of these questionnaires together with a description of the specific sampling methods and information sources used, form part of this Appendix.) The questionnaires were designed in conjunction with Fish and Wildlife personnel

and were intended to address the different issues confronting each group at this particular time. A questionnaire package containing questionnaire, covering letter and return envelope plus postage was then sent to each person on each of the eight lists.

When completed questionnaires were received, the enclosed information was coded and the data processing was performed by computer. For the analysis, the Statistical Program for the Social Sciences (SPSS) was the computer program used. This program provided sample means, frequencies and distributions for each of the variables involved. In addition, the information was further broken down into averages and distributions for each of the seven provincial Resource Management Regions.

With this information it was then possible to extrapolate the data to provide estimates of total earnings, operating expenses, investment, etc. for each group within each region. Provincial estimates were calculated as the sum of the regional totals. In this way, differences between the response rates for each region could be ignored in the calculation of provincial totals. The estimates resulting from this data gathering and analysis process are the basis of the numbers contained in the report.

In terms of the sampling methods and questionnaires utilized for each group, there were some significant differences. As well, the response rates for each group were different. A summary of the methods used, questionnaires and response rates for each group follows this discussion. This information can be used to provide a better understanding of how the information contained in the report was derived and may be of use to anyone who may attempt to conduct a similar study at some other time or place.

In total some 2,070 questionnaires were sent to different individuals during this study. Of these only 824 (39.8%) were returned completed. While this response rate means that the information provided by this

process represents the view of a minority group with a particular bias or reason for responding, the information summarized in the report is the best that could be gathered under the particular circumstances of this study. Much credit for the number of questionnaires that actually were completed and returned must go to the Western Guides and Outfitter's Association, the Northern B.C. Guide's Association, B.C. Interior Fish Camp Operator's Association, and the Resident Wildlife and Tourist Association, all of who promoted the study and urged their members to cooperate.

1. GUIDE OUTFITTERS IN 1978

Source of Information:

List of Guide Outfitters in 1977 published by Fish and Wildlife Branch, Victoria. (No 1978 information available prior to mailing.)

Total Size of Group:

310

Method of Selecting Sample:

All Guide Outfitters in 1977 were sent questionnaires. Upon release of 1978 information on Guide Outfitter's Licences and Certificates, this list was amended so that guides no longer in operation were removed from the sample. The sample therefore excludes guides who were not active in 1977 but who purchased licences in 1978.

Sample Size:

297 (See Table B for Breakdown)

Contents of Questionnaire Package:

Questionnaire (of which questions 1 to 24 were the same for guides with and without Certificates and question 25 related solely to the role of the Certificate as perceived by guides

Sportsfish
and
Wildlife
Values
in
British
Columbia

THE GUIDING INDUSTRY IN

BRITISH COLUMBIA

The British Columbia Fish and Wildlife Branch is sponsoring a study of the importance of the guiding industry to the province. To successfully complete this study we must rely on you and other Guide Outfitters to provide us with information that we could otherwise not get. Please assist us by answering the questions below as accurately as possible. Individual responses will remain confidential.

1. In which locations within the province and/or Wildlife Management Unit(s) do you:

Have your base camp?

....

Take your clients to hunt?

....

2. How many years were you active as:

An Assistant Guide?

.... years

A Guide Outfitter?

.... years

For how many years have you had your guiding business?

.... years

How long has your business been at its present location?

.... years

3. Do you operate in association with other Guide Outfitters?

☐ Yes ☐ No

If yes, please identify your partner(s) and describe the nature of your association.

....

....

....

4. How many hunters did your guiding business handle in 1978:

In total?

.... hunters

By season?

winter hunting .... hunters

spring hunting .... hunters

fall hunting .... hunters

Of the total, how many were British Columbia residents?

.... hunters

How many hunters were Canadians from outside B.C.?

.... hunters

How many hunters were non-residents of Canada?

.... hunters

5. Since 1974 has the number of hunters using your guiding services been increasing or decreasing?

Residence of Hunter	Increased	Stayed the Same	Decreased	What factors would explain this trend?
British Columbians				....
Other Canadians				....
Non-Canadians				....

6. Under existing regulations do you expect this trend to continue?

☐ Yes ☐ No

Please explain ....

....

....

....

7. Which big game species are you allowed to guide for?

black bear ☐
caribou ☐
cougar ☐
deer-whitetailed ☐
deer-mule ☐
elk ☐
grizzly bear ☐
moose ☐
mountain goat ☐
mountain sheep-bighorn ☐
mountain sheep-thinhorn ☐
wolf ☐

8. Are the majority of your hunting clients after trophies or meat?

Trophy ☐
Meat ☐
Both ☐

9. In order of importance name the three big game species most commonly hunted by your clients.

(most important)

1. ....
2. ....
3. ....

10. Do you provide guiding services to fishermen or other non-hunters during other times of the year?

☐ Yes ☐ No

If yes, which months of the year do you operate your guiding business for non-hunters?

Jan ☐ May ☐ Sept ☐
Feb ☐ June ☐ Oct ☐
Mar ☐ July ☐ Nov ☐
Apr ☐ Aug ☐ Dec ☐

How many fishermen did your guiding business handle during the 1978 non-hunting season?

.... fishermen

How many other recreationists (photographers, wilderness expeditions, etc.) made use of your guiding services?

.... people

Has the number of non-hunters using your guiding services been increasing or decreasing over the last five years?

Increasing ☐
Decreasing ☐
Remained the same ☐

11. During 1978 what was the average fee that hunters paid for guiding services?

$ .... per ☐ day ☐ week

For this fee, what services and facilities are provided?

....

....

What was the average guiding fee paid by fishermen?

$ .... per ☐ day ☐ week

What services and facilities are provided for this fee?

....

....

What guiding fees were paid by other people hiring guide services?

$ .... per ☐ day ☐ week

For these fees, what services and facilities are provided?

....

....

The next questions deal with the economics of the guiding industry. Your responses are our only source of this information. We must emphasize that the confidentiality of individual answers will be respected.

12. For 1978, what do you expect the gross income of your guiding business to be?

$..................

13. What proportion of your guiding business's gross income depends specifically on non-British Columbians?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

14. As operator and/or owner of this guiding business, what will be your personal income (any wages paid to yourself and/or profits) from big game guiding this year?

$0-999 ☐ $15,000-19,999 ☐
$1,000-2,499 ☐ $20,000-24,999 ☐
$2,500-4,999 ☐ $25,000-29,999 ☐
$5,000-9,999 ☐ $30,000-39,999 ☐
$10,000-14,999 ☐ Over $40,000 ☐

15. What percentage of your total personal annual employment income will come from big game guiding business?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

If guiding does not provide all your employment income, what is your permanent or alternative source of employment?

....

....

16. How many people did you employ for your guiding and outfitting business last year? (For each category of employee indicate the number you hired, their average rate of pay and the number of weeks they worked.)

Position	Number of Employees	Average Pay per Week	Average Number of Weeks Worked
Assistant Guides	....	$............	....
Wrangler	....	$............	....
Cook	....	$............	....
Other	....	$............	....

17. Do you employ any members of your family?

☐ Yes ☐ No

If yes, how many people?

.... people

How many of your employees are:

Status Indians?

.... employees

Non-Status Indians?

.... employees

In your opinion, how many employees would likely be unemployed during hunting season if they were not working for you?

.... employees

18. To what extent is your business Canadian Owned?

No Canadian ownership ☐
1-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-99% ☐
Entirely Canadian owned ☐

19. In what manner do you compete for clients with other guides?

Available big game species ☐
Guiding fees ☐
Reputation ☐
Advertising ☐
Hunter success rates ☐
Available facilities and services ☐
Other ☐
(Please specify)

....

20. Over the past five years how much money have you spent on the following components of your guiding business?

	This Year 1978	1977	1976	1975	1974
Buildings	$........	$.......	$........	$........	$........
Horses and packing equipment	$........	$.......	$........	$........	$........
Camping and hunting equipment	$........	$.......	$........	$........	$........
Roads and trails	$........	$.......	$........	$........	$........
Aircraft and landing facilities	$........	$.......	$........	$........	$........
Other (Communications equipment, etc.)	$........	$.......	$........	$........	$........

21. One goal of this study is to determine the impact of your activities on local businesses and employment. Please list your operating expenses for 1978 according to the following categories:

	Money Spent Locally	*Total Expenditures*
Labour	$..........	$..........
Supplies	$..........	$..........
Repairs and Maintenance	$..........	$..........
Taxes and Interest Charges	$..........	$..........
Air Charter	$..........	$..........
Other (Advertising, etc.)	$..........	$..........

2. How could Fish and Wildlife Branch policies or operations be modified to improve your guiding business?

....

....

....

....

....

3. Do you think a quota system to control non-resident harvests of big game should be broadly applied?

☐ Yes ☐ No

If yes, for what species and why should quotas be established?

....

....

....

....

....

4. In some parts of British Columbia resident hunters have been hiring unlicenced outfitters (packers) so that they can hunt in isolated areas without having to hire a licenced guide.

This situation has led to conflict and confrontations between packers and guides. Have you or your clients ever experienced such problems?

☐ Yes ☐ No

If yes, please describe the type of incident and the frequency with which these incidents occur.

....

....

....

....

....

25. According to Fish and Wildlife Branch records you presently hold a Guide Outfitters Certificate. As we are very interested in learning what impacts the certification process has had upon the Guiding Industry, we would ask that you complete the following questions carefully.

How long have you had a Guide Outfitters Certificate?

.... years

Did you receive a Certificate by purchasing a guiding business?

☐ Yes ☐ No

If yes, how much did you pay to purchase the guiding business?

$.............

If the business had not been Certified, how much do you think it would have cost you to purchase the same guiding business?

$.................

Do you think that having a Certificate has helped your guiding business?

☐ Yes ☐ No

Please explain ....

....

....

....

....

What were your reasons for obtaining a Certificate?

....

....

....

....

....

Has owning a Certificate led you to invest more money in developing and improving your guiding business?

☐ Yes ☐ No

Please explain ....

....

....

What do you consider to be the present value of your guiding business? (That is, what would be the current market value of your business if you were to market it for sale?)

$...................

Without a Guide Outfitter's Certificate what would you consider to be the present value of your guiding business, if you were to market it for sale?

$...................

What do you see as the critical factors that affect the continued operation of your business?

....

....

....

....

....

....

....

....

....

An additional sheet for your comments has been provided. Please feel free to discuss any important issues concerning the operation and administration of the guiding industry in British Columbia. Please remember that your remarks will be held in strict confidence.

22. How could Fish and Wildlife Branch policies or operations be modified to improve your guiding business?

....

....

....

....

....

23. Do you think a quota system to control non-resident harvests of big game should be broadly applied?

☐ Yes ☐ No

If yes, for what species and why should quotas be established?

....

....

....

....

....

24. In some parts of British Columbia resident hunters have been hiring unlicenced outfitters (packers) so that they can hunt in isolated areas without having to hire a licenced guide.

This situation has led to conflict and confrontations between packers and guides. Have you or your clients ever experienced such problems?

☐ Yes ☐ No

If yes, please describe the type of incident and the frequency with which these incidents occur.

....

....

....

....

....

25. According to Fish and Wildlife Branch records you presently do not hold a Guide Outfitter's Certificate. As the Branch is very interested in learning what impacts the certification process has or has not had upon the guiding industry, we would ask that you complete the following questions very carefully.

Have you ever applied for a Certificate or attempted to buy a Certificated territory?

☐ Yes ☐ No

If yes, what prevented you from obtaining a Certificate? Are there any obstacles that you would like to see removed?

....

....

....

....

....

....

If no, what are your reasons for not wanting a Certificate?

....

....

....

....

....

....

Will you attempt to obtain a Certificate at some time in the future?

☐ Yes ☐ No

What do you perceive the advantages or disadvantages of holding a Guide-Outfitter's Certificate?

....

....

....

....

....

What do you see as the critical factors that affect the continued operation of your business?

....

....

....

....

....

....

An additional sheet for your comments has been provided. Please feel free to discuss any important issues concerning the operation and administration of the guiding industry in British Columbia. Please remember that your remarks will be held in strict confidence.

Thank you for your cooperation. Please return your completed questionnaire in the attached self-addressed envelope.

with and without a Certificate), covering letter from Canadian Resourcecon Ltd., covering letter from Western Guides and Outfitter's Association (sent to all members in first mailing and to all guides in second mailing), and return envelope with postage.

Number of Mailings:

2

Follow-up:

A second mailing was decided upon six weeks after the initial questionnaire mailing. At this time only 25.9% of the questionnaires had been completed and returned.

Number of Returns:

Completed Returns	134
Post Office Returned	5
Total	139

Percent Completed:

45.1% (completion rates for particular Resource Management Regions are summarized in Table B).

Comments:

Sample information could, in some cases, be compared to existing knowledge about the industry. On the basis of the information received, those guides who did respond to the questionnaire had operations that were larger than the average. While there was justification for scaling down the sample information to provide estimates about the total industry, this was not done because insufficient information existed to determine the exact size of the scaling factor.

TABLE B

RETURN OF GUIDE OUTFITTER QUESTIONNAIRES ACCORDING TO RESOURCE MANAGEMENT REGIONS

Resource Management Region	Number of Guide-Outfitters in 1978/79	Number of Questionnaires Sent	Questionnaires Completed	Questionnaires Returned by Post Office	Percent Completed
Vancouver Island	5	4	1		25.0%
Lower Mainland	3	3	2		66.7%
Thompson-Okanagan	24	21	7		33.3%
Kootenay	42	41	16		39.0%
Cariboo	87	87	39	1	44.8%
Skeena	60	54	34	1	63.0%
Omineca-Peace	93	87	35	3	40.2%
Provincial Total	314	297	134	5	45.1%

2. ASSISTANT GUIDES IN 1978

Source of Information:

Duplicates of licence applications for 1977, Fish and Wildlife Branch, Victoria (no 1978 information yet available).

Total Size of Group:

988 licencees in 1978

Method of Selecting Sample:

Using the list of 878 licence holders from 1977 as prepared by Fish and Wildlife Branch, every third licence holder was assigned to the sample group. If no address was available, the guide was removed from the sample.

Sample Size:

258

Contents of Questionnaire Package:

Questionnaire, covering letter from Canadian Resourcecon Ltd., return envelope plus postage.

Number of Mailings:

1

Follow-Up:

None

Number of Returns:

Completed Returns	91
Post Office Returns	32
Total	123

Percent Completed:

35.3%

THE GUIDING INDUSTRY IN
BRITISH COLUMBIA

The British Columbia Fish and Wildlife Branch is sponsoring a study of the importance of the guiding industry in the province. To successfully complete parts of this study we must rely on information obtained from Assistant Guides. Please assist us by answering as accurately as possible the questions asked below. Individual responses will remain confidential.

1. For which Guide Outfitter did you work in 1977?

....

Is the Guide Outfitter named above any relation to you?

☐ Yes ☐ No

2. How many weeks did you work as an Assistant Guide?

.... weeks

3. What was your total earnings for this period? (Include wages, tips and bonuses.)

$ ....

4. Do you have a regular occupation when you are not guiding?

☐ Yes ☐ No

If yes, what?

....

5. Did you give up a regular job in order to guide in 1977?

☐ Yes ☐ No

If yes, what kind of job did you give up?

....

6. What proportion of your total annual income comes from working as an Assistant Guide?

☐ 0-20%
☐ 21-40%
☐ 41-60%
☐ 61-80%
☐ 81-100%

7. What is your present age?

.... years

8. Are you a:

Non-Indian ☐
Status Indian ☐
Non-Status Indian ☐

9. For how many years have you been guiding?

.... years

10. At some time in the future do you wish to become a Guide Outfitter?

☐ Yes ☐ No

11. Are there any obstacles which are preventing you from acquiring a Guide Outfitter's Licence now?

☐ Yes ☐ No

If yes, please indicate in order of importance, which obstacle(s) you feel are preventing you from becoming a Guide Outfitter: (MOST IMPORTANT = 1)

☐ Insufficient funds to operate independently
☐ No available guiding areas
☐ Lack of guiding experience
☐ High risk of operating independently
☐ Uncertainty about profitability of operations
☐ Problems with Fish and Wildlife Branch policies or practices
☐ Other, Please specify

....

....

12. What is your primary reason for working as an Assistant Guide?

☐ To supplement your income
☐ Enjoy hunting and working outdoors
☐ Nothing else to do
☐ Qualifying for a Guide-Outfitters Licence
☐ Other, please specify

....

....

....

....

....

13. Do you plan to continue to work as an Assistant Guide?

☐ Yes ☐ No

Thank you for your cooperation. Please return the completed questionnaire in the attached self-addressed envelope.

Comments:

The address information on the licence forms was very scanty, and many were returned by the Post Office. The address of 39 Assistant Guides (15.1%) was a general delivery pick-up at various post offices throughout the province. Another 108 Assistant Guides (41.8%) were listed with only a local post office. Therefore, only 43.1% of the Assistant Guides on the mailing list had complete mailing addresses.

3. NON-RESIDENT HUNTERS IN 1977

Source of Information:

Duplicates of licence application forms for non-resident hunters, Fish and Wildlife Branch, Victoria.

Total Size of Group:

Canadian - 518; U.S.A. - 3,441; Other - 365.

Method of Selecting Sample:

For Canadian hunters, every 10th hunter (in alphabetical order) was put in the sample group. For American and others, every 5th hunter (in alphabetical order) was included on the mailing list.

Sample Size:

Canadian - 56; U.S.A. - 761; Other - 62.

Contents of Questionnaire Package:

Questionnaire, covering letter from Canadian Resourcecon Ltd. (in German to hunters in most European countries), return envelope and return postage (except for destinations outside Canada and the U.S.A.)

Number of Mailings:

1

Follow-Up:

None

Number of Returns:

	Canadian	U.S.A.	Other
Completed Returns	17	344	20
Post Office Returns	6	20	0
Total	23	364	20

Percent Completed:

Canadian - 30.4%; U.S.A. - 45.2%; Other - 32.3%

4. RESIDENT HUNTERS USING GUIDES IN 1977

Source of Information:

Guide Outfitter report forms from 1977. List of names prepared by Fish and Wildlife Branch.

Total Size of Group:

77 (Note: Some hunters used guide more than once in 1977)

Method of Selecting Sample:

100% sample undertaken

Sample Size:

77

Contents of Questionnaire Package:

Questionnaire, covering letter from Canadian Resourcecon Ltd., return envelope plus postage.

Number of Mailings:

1

SURVEY OF NON-RESIDENT

HUNTERS

The British Columbia Fish and Wildlife Branch is sponsoring a study of the importance of big game hunting and the guiding industry to the Province.
To successfuly complete this study we must depend for much of the data we need upon hunters, such as yourself, who use the resource.
Please assist us by answering as accurately as possible the questions asked below. Individual responses will remain confidential.

1. How long were you in British Columbia for your hunting trip in 1977?

.... days

How many days did you actually spend hunting big game in British Columbia?

.... days

2. During your hunting trip did you spend any time fishing?

☐ Yes ☐ No

If so, on how many days did you fish?

.... days

3. Please give the name of your Guide-Outfitter.

....

4. When actually hunting were you accompanied mainly by the Guide-Outfitter named above or by one of his Assistant Guides?

☐ Accompanied by the Guide-Outfitter

☐ Accompanied by an Assistant Guide

5. How many weeks in advance of your hunt did you book your trip?

.... weeks

How far in advance did you buy your licence?

.... weeks

6. How did you become aware of the Guide-Outfitter named above?

Advertising ☐
Repeat visit ☐
Recommended by a friend ☐
Other ☐
(Please specify)

....

7. Why did you choose to hunt in British Columbia?

....
....
....
....

8. Was hunting the primary reason for this trip?

☐ Yes ☐ No

If no, for what other purposes did you take this trip?

....

9. Were you hunting primarily for a trophy or for meat?

Trophy ☐
Meat ☐
Both ☐

In order of importance to you, which games species were you after on this hunt?

(most important)

1. ....
2. ....
3. ....

10. For what species did you buy a tag or species licence?

black bear ☐
grizzly bear ☐
cougar ☐
wolf ☐
caribou ☐
deer ☐
elk ☐
moose ☐
mountain goat ☐
Mountain sheep ☐

11. On your hunt did you kill any big game animals?

☐ Yes ☐ No

If yes, which species?

black bear ☐
grizzly bear ☐
cougar ☐
wolf ☐
caribou ☐
deer ☐
elk ☐
moose ☐
mountain goat ☐
mountain sheep ☐

12. What parts of the animal did you take home?

Antlers or horns ☐
Head and cape ☐
Meat ☐
Skin or Hide ☐

13. How would you rate the quality of your guided hunt in British Columbia?

Poor ☐
Fair ☐
Average ☐
Good ☐
Excellent ☐

Was the quality of you hunt up to your expectations?

☐ Yes ☐ No

Please explain. ....

....

....

....

....

14. Have you ever hunted big game anywhere other than British Columbia?

☐ Yes ☐ No

If yes, how did the quality and cost of this hunt compare to your other big game hunting experiences?

	This Hunt Was:		
	Better	*About the Same*	*Worse*
Availability of Game	☐	☐	☐
Quality of the Hunt	☐	☐	☐
Cost of the Hunt	☐	☐	☐
Quality of Guiding Services	☐	☐	☐

(Please check appropriate boxes)

15. This question deals with the cost of your hunt and is particularly important. Please fill in only the costs of your hunt.

Hunting Licence $...........

Species Licence (Tags) $...........

Guide's Fees $...........

Tips and bonuses paid to guide $...........

Were you required to pay an additional fee to the guide if you killed an animal?

☐ Yes ☐ No

If yes, how much?

$................

For which species?

....

16. During your trip to British Columbia you probably incurred expenses over and above the cost of the hunt. For these additional expenditures please list only those amounts actually spent in British Columbia.

Food (meals, groceries, tobacco, sundries) $...........

Alcoholic beverages $...........

Lodging $...........

Taxidermy and tanning Game, storage, processing, shipping $..........

Other expenses (such as equipment bought specifically for this hunt) $..........

Transportation:

How did you travel to British Columbia?

....

Please list your expenditures on travel within British Columbia according to the categories listed below:

Plane, train, bus or boat fares $..........

Gas and oil $..........

Vehicle hire (including trailer rentals) $..........

Vehicle repairs $..........

Thank you for your cooperation. Please return the completed questionnaire in the attached self-addressed envelope.

Sportsfish and Wildlife Values in British Columbia

SURVEY OF RESIDENT HUNTERS

USING GUIDES

The British Columbia Fish and Wildlife Branch is sponsoring a study of the importance of big game hunting and the guiding industry to the province.

To sucessfully complete this study we must depend for much of the data we need upon hunters, such as yourself, who use the resource. Please assist us by answering as accurately as possible the questions asked below. Individual responses will remain confidential.

1. In what area(s) of the province and/or Wildlife Management Unit(s) did you hunt big game with a guide in 1977?

   ....

2. Do you recall the name of the Guide-Outfitter in whose guiding territory you hunted?

   Name ....

3. When actually hunting were you accompanied mainly by the Guide-Outfitter named above or by one of his his Assistant Guides?

   ☐ Accompanied by the Guide-Outfitter

   ☐ Accompanied by an Assistant Guide

4. How many days did your guided hunt last?

   .... days

   In 1977 how many days in total did you hunt big game in British Columbia (both with and without guides)?

   .... days

   In 1977 approximately how many days of holidays (excluding weekends) did you take?

   .... days

5. During your guided hunting in 1977 which big game species did you kill?

   Black bear ☐
   Grizzly bear ☐
   Cougar ☐
   Wolf ☐
   Deer ☐
   Caribou ☐
   Elk ☐
   Moose ☐
   Mountain goat ☐
   Mountain sheep ☐

6. In order of importance, which big games species did you hunt on your guided hunt?

   (most important)

   1. ....
   2. ....
   3. ....

On your guided hunt were you hunting for meat or for trophy?

Trophy ☐
Meat ☐
Both ☐

On how many days during your guided hunt did you fish?

.... days

7. Had you ever hired a big game guide in British Columbia before the 1977 season?

   ☐ Yes ☐ No

   If yes, on how many occasions have you hired guides?

   .... times

8. How does guided hunting compare to non-guided hunting:

   Guided Hunting Is:

	Better	*About the Same*	*Worse*
Availability of game	☐	☐	☐
Quality of the hunt	☐	☐	☐
Hunting success rates	☐	☐	☐

(Please check appropriate boxes)

9. As it is not compulsory for resident hunters to hire a big game guide, what was your primary reason for choosing to hire a guide in 1977?

   ☐ To gain better access to better hunting areas

   ☐ To hunt for a particular species located in that guiding territory

   ☐ To improve the chance of getting an animal

   ☐ Other, please specify

   ....

   ....

10. Were you satisfied with the guide and outfitting services that you received?

    ☐ Yes ☐ No

    Please explain ....

    ....

    ....

11. Are you considering returning to that area at some time in the future to hunt without the services of a guide?

    ☐ Yes ☐ No

12. Do you plan to hire a guide again sometime in the future?

    ☐ Yes ☐ No ☐ Uncertain

13. Have you ever considered using the services of a packer rather than a guide? (Packers are allowed to provide transportation and accommodation services into remote hunting areas but cannot actively participate in the hunt.)

☐ Yes ☐ No

Please explain ....

....

....

....

14. On your 1977 hunt how much money did you pay to the Guide-Outfitter for his services and facilities?

Fees $...........

Tips and Bonuses $...........

If you shot an animal were you required to pay an additional charge to your guide?

☐ Yes ☐ No

If yes, how much were you required to pay?

$..............

For which species?

....

Do you consider the cost of a guide to be excessive?

☐ Yes ☐ No

If guiding fees were lower would you use the services of a guide more often?

☐ Yes ☐ No

15. What was your gross personal income in the 1977 taxation year?

$0-2,999 ☐
$3,000-5,999 ☐
$6,000-8,999 ☐
$9,000-11,999 ☐
$12,000-14,999 ☐
$15,000-19,999 ☐
$20,000-24,999 ☐
$25,000-29,999 ☐
$30,000-34,999 ☐
Over $35,000 ☐

16. This is a hypothetical question that if answered as accurately as possible, will help us to determine the value of big game hunting to British Columbians. Please consider the question carefully and answer according to your best estimate.

As one measure of the value of the wildlife resource, what is the maximum amount you would be willing to pay for a day of big game hunting in British Columbia, over and above your actual expenses?

$........... per day

If for some reason your actual hunting costs were to rise to the maximum described above, on how many days would you hunt each year?

.... days

COMMENTS:

....

....

....

....

....

....

....

....

....

....

....

....

Thank you for your cooperation. Please return the completed questionnaire in the attached self-addressed envelope.

Sportsfish

and

Wildlife

Values

in

British

Columbia

Follow-Up:

A telephone follow-up was used for hunters in the Lower Mainland and Vancouver Island.

Number of Returns:

Completed Returns - 31

Percent Completed:

40.8%

Comments:

Some of the people contacted claimed not to have used a guide in 1977. For example, two were B.C. businessmen who organized hunting parties for non-Canadian business associates, whose primary reason for visiting B.C. was not hunting. The telephone follow-up also revealed that many of the hunters who had not responded to the initial questionnaire mailing, were reluctant to do so because of the questions dealing with their personal income. When the purpose of the study and the questions were reiterated over the telephone, most were content to provide information for the entire questionnaire.

5. PACKERS

Source of Information:

Resident Wildlife and Tourist Association, Western Guides and Outfitters Association.

Total Size of Group:

Unknown

Method of Selecting Sample:

Questionnaires sent to any known packer.

THE PACKING INDUSTRY IN BRITISH COLUMBIA

The British Columbia Fish and Wildlife Branch is sponsoring a study of the importance to the province of the commercial exploitation of fish and wildlife resources. To successfully complete this study we must rely entirely on information obtained from you and other members of the packing industry. Please assist us by answering as accurately as possible the questions asked below. Individual responses will remain confidential.

1. In what location(s) and/or Wildlife Management Unit(s) do you usually:

operate your base camp?

....

take your clients to hunt?

....

2. For how many years have you provided transportation and accommodation services for hunters from British Columbia?

.... years

For how many years have you provided packing services to non-hunters, including fishing and survey parties, etc.?

.... years

3. Have you ever held a guide's licence or otherwise worked as a big game guide?

☐ Yes ☐ No

If yes, for how long did you work as a big game guide?

.... years

What type of licence did you hold?

☐ Guide-Outfitter *(First or Second Class Guide)*

☐ Assistant Guide

Do you presently hold a Small Game and/or Angling Guide's Licence?

☐ Yes ☐ No

4. Are you a:

Non-Indian ☐
Status Indian ☐
Non-Status Indian ☐

5. Over the last five years how many hunters have made use of your services?

This Year 1978 ☐ 1977 ☐ 1976 ☐
1975 ☐ 1974 ☐

Do you expect hunters' demands for your services to increase or decrease in the future?

☐ Increase ☐ Decrease

6. Do most of your clients hunt for trophies or for meat?

Trophy ☐
Meat ☐
Both ☐

7. In order of importance name the three big game species most commonly hunted by your clients.

(most important species)

1. ....
2. ....
3. ....

8. Over the last five years how many non-hunters have made use of your services?

Number of fishermen:

This Year 1978 ☐ 1977 ☐ 1976 ☐
1975 ☐ 1974 ☐

Number of wilderness campers:

This Year 1978 ☐ 1977 ☐ 1976 ☐
1975 ☐ 1974 ☐

Other:

This Year 1978 ☐ 1977 ☐ 1976 ☐
1975 ☐ 1974 ☐

Total:

This Year 1978 ☐ 1977 ☐ 1976 ☐
1975 ☐ 1974 ☐

Do you expect non-hunters' demands for your services to increase or decrease in the future?

Increase ☐
Decrease ☐

9. What are your peak months of operation for providing services for:

hunters?

....

non-hunters?

....

10. During 1978 what was the average fee that hunters paid for your services?

$ .... per ☐ day ☐ week

For this fee what services and facilities would be provided?

....

....

....

What was the average fee paid by fishermen?

$ .... per ☐ day ☐ week

What services and facilities would be provided for this fee?

....

....

....

What was the average fee paid by other people who hired your services?

$ .... per ☐ day ☐ week

For these fees, what services and facilities are provided?

....

....

....

The remaining questions deal mainly with the economics of the packing industry. Your responses are our only source of this information. We emphasize that the confidentiality of individual responses will be respected.

11. For 1978 what do you expect the gross income of your packing business to be?

$ ....

12. What proportion of your packing business's gross income depends specifically on resident hunters?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

13. As operator and/or owner of this packing business, what will be your personal income (wages paid to yourself and/or profits) from operating a packing business?

$0-999 ☐ $5,000-9,999 ☐
$1,000-1,999 ☐ $10,000-14,999 ☐
$2,000-2,999 ☐ $15,000-19,999 ☐
$3,000-3,999 ☐ $20,000-24,999 ☐
$4,000-4,999 ☐ Over $25,000 ☐

14. What percentage of your total annual employment income will come from your packing business?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

15. Do you have an alternative source of employment?

☐ Yes ☐ No

If yes, what is your alternate occupation?

....

16. How many people did you hire for your packing business in 1978?

Number of employees ....

Average pay per week ....

Average number of weeks worked ....

Do you employ any members of your family?

☐ Yes ☐ No

If yes, how many people?

....

How many of your employees are:

Status Indians ....

Non-Status Indians ....

In your opinion, how many employees would likely be unemployed during summer and fall months if they were not working for you?

....

17. To what extent is your business Canadian owned?

No Canadian Ownership ☐
1-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-99% ☐
Entirely Canadian Owned ☐

18. Over the past five years how much money have you spent on the following components of your packing business?

	This Year 1978	1977	1976	1975	1974
Buildings	$.......	....	....	....	....
Horses and packing equipment	$.......	....	....	....	....
Camping equipment	$.......	....	....	....	....
Boats	$.......	....	....	....	....
Aircraft and landing facilities	$.......	....	....	....	....
Other (Communications equipment, etc.)	$.......	....	....	....	....

19. One goal of this study is to determine the impact of your activities on local businesses and employment. Please list your operating expenses for 1978 according to the following categories:

	Money Spent Locally	Total Expenditures
Labour	$..........	$..........
Supplies	$..........	$..........
Repairs and Maintenance	$..........	$..........
Taxes and Interest Charges	$..........	$..........
Other (advertising, etc.)	$..........	$..........

20. How could Fish and Wildlife Branch policies be modified to improve your packing operation?

....

....

....

....

....

....

21. Some licenced hunting guides (Guide-Outfitters) have objected to certain individuals and/or companies who provide transportation and accommodation services for resident hunters. These objections have led to confrontations between guides and packers. Have you or your clients ever experienced such problems?

☐ Yes ☐ No

If yes, please describe the type of incident and how often these problems occur.

....

....

....

....

....

....

22. In order to identify and quantify all the benefits of the packing industry it is necessary for us to contact some of the hunters and fishermen who used your services. Unfortunately there are no records that identify clients of the packing industry. If we are to contact any of these people we must rely entirely upon yourself and other packers to give us the names and addresses of their clients. To assist us in the evaluation of your industry please include a list of the names and addresses of some of your clients in 1978.

....

....

....

....

....

....

....

....

....

Thank you for your cooperation. Please return the completed questionnaire in the attached self-addressed envelope.

Sportsfish
and
Wildlife
Values
in
British
Columbia

Sample Size:

24

Contents of Questionnaire Package:

Questionnaire, covering letter from Canadian Resourcecon Ltd. and Resident Wildlife and Tourist Association.

Number of Mailings:

1

Follow-Up:

None

Number of Returns:

Completed Returns	5
Post Office Returned	3
Total	8

Percent Returned:

20.8%

Comments:

As with Assistant Guides, the mailing information was extremely sketchy for packers. Outside of the members of the Resident Wildlife and Tourist Association, the majority of the packers included on the mailing list only had "suspected" addresses. There was no means of verifying the addresses of the packers suggested by the Western Guides and Outfitters Association.

6. CHARTER AIRLINES

Source of Information:

List of Charter Airlines operating in British Columbia prepared by Tourism B.C.

11. In the provision of fly-in services has your airline hired any help or invested in any facilities which they would otherwise not have done?

☐ Yes ☐ No

If yes, please indicate the number of employees attributable only to the operation of fly-in camps.

Job Task	*Number of Employees*	*Work Location*	*Average Weekly Wage*	*Number of Man Weeks of Paid Employment Per Year*
....	....	....	....	....
....	....	....	....	....

Please indicate the amount you have invested in order to provide these services.

Aircraft $ .... Landing Facilities $ ....

Buildings $ .... Other $ ....

12. One goal of this study is to determine the impact of your activities on local businesses and employment. For that part of your business which depends on hunting and fishing camps please list your operating expenses for 1978.

	Money Spent Locally	Total Expenditures
Labour	$..........	$.........
Supplies	$..........	$.........
Repairs and Maintenance	$..........	$.........
Taxes and Interest Charges	$..........	$.........
Other (advertising, etc.)	$..........	$.........

13. Some licenced hunting guides (Guide Outfitters) have objected to certain individuals and/or companies who provide transportation and accommodation services for resident hunters. These objections have led to confrontations and conflict. Have you or your clients ever experienced such problems?

☐ Yes ☐ No

If yes, please describe the type of incident and how often these problems occur.

....

....

....

....

14. In order to identify and quantify all the benefits associated with the use of charter aircraft and fly-in hunting and fishing camps, it is necessary for us to contact some of the hunters and fishermen who used your services. Unfortunately there are no public records that would identify your clients for us. If we are to contact any of these people we must rely entirely upon each charter airline to provide us with information on their clientele. **To assist us in the evaluation of fly-in fishing and hunting camps in British Columbia, please include a list of names and addresses of some of your clients in 1978.**

Thank you for your cooperation. Please return the completed questionnaire in the attached self-addressed envelope.

SURVEY OF CHARTER AIRLINES

In an earlier survey all charter airlines in British Columbia were canvassed to determine whether or not they offer or advertise to fly people and supplies into small established fresh-water fishing and hunting camps, and whether they also assist in the operation of these camps. This questionnaire is being sent to all charter airlines, in order to quantify the degree to which charter airlines rely upon the exploitation of the Province's fish and wildlife resources. To assist us in this endeavour, please respond to the questions below keeping in mind that the questions relate only to operations that you advertise or offer to prospective clients. The success of this study depends completely on the willingness of each airline to participate. We would greatly appreciate your cooperation. All responses will be kept strictly confidential.

1. Do you advertise or offer your services primarily to fishermen, hunters or both?

fishermen ☐
hunters ☐
both ☐

2. What are the names and/or locations of the camps to which you fly clients?

Name of Camp	*Type of Camp (Hunting, Fishing Both)*	*Location*	*Wildlife Management Unit*

3. Does your airline assist in the operation of these camps?

☐ Yes ☐ No

If yes, please describe the nature of your involvement

....

....

....

4. Does your airline advertise and operate in association with a registered Guide Outfitter or a member of the packing industry?

☐ Yes ☐ No

If yes,

Name Guide Outfitter

....

Name Packer

....

5. In 1978 approximately how many hunters/fishermen used your services?

Hunters ....

Fishermen ....

Of these, how many were non-residents of British Columbia?

Hunters ....

Fishermen ....

6. In comparison to other years is the demand for fly-in fishing/hunting camps increasing, decreasing or staying the same?

Increasing ☐
Decreasing ☐
Staying about the same ☐

7. What was the average cost in 1978 for a client using the fly-in camp services listed in #4 above?

Hunters:

$ .... ☐ day ☐ week

Fishermen:

$ .... ☐ day ☐ week

For these fees, what services and facilities are provided?

....

....

....

....

The remaining questions deal with the economics of providing fly-in services for hunters and fishermen. Your responses are our only source of this information. We must emphasize that the confidentiality of individual answers will be respected.

8. In 1978 what will be your total gross annual income attributable to providing fly-in camp services?

$ ....

9. What proportion of your airline's total annual income is due to the operation of fly-in camp services?

0-10% ☐
11-20% ☐
21-30% ☐
31-40% ☐
41-50% ☐
51-60% ☐
61-70% ☐
71-80% ☐
81-90% ☐
Over 90% ☐

10. Is the provision of fly-in camp services particularly important to your business in various locations (offices) during the fishing and/or hunting season?

☐ Yes ☐ No

If yes, describe how important this portion of your business is.

....

....

....

....

Total Size of Group:

36

Method of Selecting Sample:

100% sample taken

Sample Size:

32

Contents of Questionnaire Package:

Questionnaire, covering letter from Canadian Resourcecon Ltd., return envelope with postage.

Number of Mailings:

1

Follow-Up:

None

Number of Returns:

Completed Returns - 8

Percent Completed:

25.0%

Comments:

An initial letter was sent to all Charter Airlines on the list prepared by Tourism B.C. to identify whether they advertised to fly hunters or fishermen into isolated areas. Four charter airlines responded that they did not advertize this service and were subsequently removed from the sample.

SURVEY OF FRESH WATER SPORT

FISHING OPERATIONS

The British Columbia Fish and Wildlife Branch is sponsoring a study of the importance of fish camp operations to the province. To successfully complete this study we must rely on surveys of the camp operators themselves. Please assist us by answering as accurately as possible the questions asked below. Individual responses will remain confidential. Please remember that this survey deals only with fresh water sports fishing and fish camp operations.

1. In what area of the province and/or Resource Management Unit(s) does your establishment operate?

....

2. How long have you been in a business that provides services to fishermen?

.... years

How long have you been operating at your present location?

.... years

3. What services does your establishment offer to the sports fisherman?

MEALS
Restaurant ☐
Coffee Shop ☐
Grocery Store ☐

ACCOMMODATION
Motel ☐
Housekeeping Units ☐
Lodge ☐
Trailerpark ☐
Campsite ☐
Other ☐

SERVICES
Boat Rentals ☐
Boat Launching ☐
Bait & Tackle Sales ☐
Marine Gas ☐
Smokehouse Facilities ☐
Freezer Facilities, ice ☐
Fish Guide ☐
Air Charter Facilities ☐

4. Access to your establishment is by:

ROAD
Public ☐
Private ☐

WATER
Via Lake ☐
Via River ☐

AIR
Float Plane ☐
Wheeled Plane ☐

5. What kinds of sport fishing opportunities are available to clients?

SETTING
Lake ☐
River ☐
Ice Fishing ☐

FISH SPECIES

Trout
Rainbow ☐
Cutthroat ☐
Brown ☐

Char
Eastern brook "trout" ☐
Lake "trout" ☐
Dolly Varden ☐

Andromous
Steelhead ☐
Coho salmon ☐
Chinook (spring) salmon ☐

Other
Arctic grayling ☐
Mountain whitefish ☐
Kokanee salmon ☐
Northern pike ☐
Walleye ☐
Bass ☐

6. Are the sport fishing opportunities described above enhanced or specially controlled by any of the following practices or policies of the Fish and Wildlife Branch?

	RIVER	LAKE
Lake Rehabilitation	☐	☐
Restocking	☐	☐
Spawning facilities improvements	☐	☐
Species closures	☐	☐
Gear restrictions - *fly fishing only*	☐	☐
-other	☐	☐
Bait restrictions - *roe ban*	☐	☐
-natural bait ban	☐	☐
Boating restrictions - *boat ban*	☐	☐
-power boat ban	☐	☐
Steelhead catch and release fishing	☐	☐
Trophy fishery	☐	☐
Special lake/river angling licence required	☐	☐

7. Do you feel that the part of your business that depends on fresh water sports fishermen has benefitted from the work of the Fish and Wildlife Branch? (Please explain)

....

....

....

....

....

....

....

....

....

8. During what months of the year does your establishment operate for fishermen?

Jan ☐ May ☐ Sept ☐
Feb ☐ June ☐ Oct ☐
Mar ☐ July ☐ Nov ☐
Apr ☐ Aug ☐ Dec ☐

9. Do you provide accommodation and/or transportation services for big game hunters during hunting season?

☐ Yes ☐ No

If yes:

Describe type of services you offer.

....

....

....

How many hunters made use of your services in 1978?

.... hunters

The next questions deal with the economics of fish camps. Your responses are our only source of this information. We must emphasize that the confidentiality of individual responses will be respected.

10. What was the approximate gross income of your operation during 1978? (As year is not ended, please estimate.)

$...................

Of this total, how much income did you receive on commission from the sale of fishing licences?

$...............

11. What proportion of your business's gross income depends specifically on fresh water fishermen?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

12. Please estimate the importance of non-resident fishermen (non-British Columbians) to your enterprise. What proportion of your business's gross income comes from non-resident fishermen?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

Over the last five years has the proportion of your business's income from non-resident fishermen:

Increased ☐
Decreased ☐
Stayed the same ☐

13. What percentage of your annual personal income comes from the operation of your establishment?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

Does the operation of your establishment provide:

Full time ☐
Part time ☐
Seasonal ☐

employment for you?

If seasonal or part-time, what is your permanent or alternative source of employment?

....

....

14. How many people did you employ in your operations last year?

Position	Number of Employees	Average Weekly Wage	Average Number of Weeks Worked
....	......	....	....
....	......	....	....
....	......	....	....
....	......	....	....

15. Do you employ any members of your family?

☐ Yes ☐ No

If yes, how many people?

.... people

How many of your employees are:

Status Indians?

.... employees

Non-Status Indians?

.... employees

In your opinion, how many employees would likely be unemployed if they were not working for you?

.... employees

16. Over the past five years how much money have you spent on the following components of your business?

	This Year 1978	1977	1976	1975	1974
Buildings	$.......	$.......	$.......	$.......	$.......
Boats and Motors	$.......	$.......	$.......	$.......	$.......
Docks, launching ramps, etc.	$.......	$.......	$.......	$.......	$.......
Roads	$.......	$.......	$.......	$.......	$.......
Vehicles	$.......	$.......	$.......	$.......	$.......
Other	$.......	$.......	$.......	$.......	$.......

17. One goal of this study is to determine the impact of your activities on local business and employment. Please list your operating expenses for 1978 according to the following categories:

	Money Spent Locally	Total Expenditures
Labour	$.........	$..........
Supplies	$.........	$..........
Repairs and Maintenance	$.........	$..........
Taxes and Interest Charges	$.........	$..........
Other (Advertising, etc.)	$.........	$..........

18. To what extent is your business Canadian owned?

No Canadian ownership ☐
1-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-99% ☐
Entirely Canadian owned ☐

19. Are you licenced as a fishing guide?

☐ Yes ☐ No

If yes, are you licenced under:

A Guide Outfitters Licence? ☐
An Assistant Guide Licence? ☐
A Small Game and/or Angling Guide Licence? ☐

20. Are any of your employees licenced as fishing guides?

☐ Yes ☐ No

If yes, are they licenced under:

A Guide Outfitters Licence? ☐
An Assistant Guide Licence? ☐
A Small Game and/or Angling Guide Licence? ☐

21. Do resident fishermen seem satisfied with the quality of fishing and the number of fish caught within the areas accessible from your operations?

☐ Yes ☐ No

Please explain ....
....
....
....

22. Do non-resident fishermen seem satisfied with the quality of fishing experiences:

within areas accessible from your operations?

☐ Yes ☐ No

Please explain ....
....
....
....

within British Columbia?

☐ Yes ☐ No

Please explain ....
....
....
....

23. Are there any changes in Fish and Wildlife Branch policies or operations that you feel would improve the viability of either your operations or the fresh water fish camp industry as a whole?

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....

24. Are there any ways in which you would like to take a more active role in the production of fish and enhancement of fish habitat sc as to improve your business opportunities?

....

....

....

....

....

....

....

....

....

....

....

....

....

....

....

*Thank you for your cooperation.
Please return the completed
questionnaire in the attached
self-addressed envelope.*

Sportsfish and Wildlife Values in British Columbia

7. FISH CAMP OPERATORS IN 1978

Source of Information:

Tourism British Columbia Tourist Accommodation Guide for 1978, Tourism British Columbia Regional Coordinators, *Victoria Daily Colonist*, B.C. Interior Fish Camp Operators Association.

Total Size of Group:

Unknown

Method of Selecting Sample:

All motels, resorts or other establishments that appeared to cater particularly to fishermen were put on the mailing list. This list was then amended after contacting various agencies and organizations. Unfortunately, fish camps not listed in the Tourism B.C. guide were not included in the survey. The number of such camps is completely unknown.

Sample Size:

414

Contents of Questionnaire Package:

Questionnaire, covering letter from Canadian Resourcecon Ltd., covering letter from the B.C. Interior Fish Camp Operators Association (sent to Association members on the first mailing and to all camps on the second mailing), return envelope with postage.

Number of Mailings:

2

Follow-Up:

A second mailing of questionnaires occurred six weeks after the initial mailing because only 21,3% of the questionnaires had been completed and returned. The second questionnaires

were sent only to operations listed as "fish camps" in the Tourism Accommodation guide.

Number of Returns:

Completed Returns	136
Post Office Returned	5
Total	141

Percent Completed:

32.9% (It should be added that 62.7% of the members if the B.C. Interior Fish Camp Operators Association responded.)

8. SMALL GAME AND/OR ANGLING GUIDES IN 1978

Source of Information:

Duplicates of licence application forms for 1977, Fish and Wildlife Branch, Victoria. (No 1978 information available at time of mailing.)

Total Size of Group:

102 licencees in 1978

Method of Selecting Sample:

Assumed distribution and characteristics of guides in 1978 to be the same as in 1977, so contacted 1977 licence holders.

Sample Size:

89 licencees in 1977

Contents of Questionnaire Package:

Questionnaire, covering letter from Canadian Resourcecon Ltd., return envelope plus postage.

SURVEY OF SMALL GAME AND/OR ANGLING GUIDES

The British Columbia Fish and Wildlife Branch is sponsoring a study of the importance of the guiding industry to the province. To successfully complete this study we must rely on surveys of the guides themselves. Please assist us by answering as accurately as possible the questions asked below. Individual responses will remain confidential. Please remember that this survey deals only with your guiding activities for small game and freshwater sports fishing.

1. Was your primary purpose for purchasing a Small Game and/or Angling Licence to guide:

For Fish ☐
For Small Game ☐
For Fish and Small Game ☐

Are the majority of your fish guiding activities directed at steelhead or other fish species?

Steelhead ☐
Other ☐

2. What area of the province and/or Resource Management Unit(s) do you usually guide in?

....

....

3. How many freshwater fishermen have you guided over the last three years?

	1978	1977	1976
Number of fishermen	☐	☐	☐

Of this total how many were:

	1978	1977	1976
British Columbians	☐	☐	☐
Canadians from outside B.C.	☐	☐	☐
Non-Canadians	☐	☐	☐

4. How many hunters for small game have you guided over the last three years?

	1978	1977	1976
Number of hunters	☐	☐	☐

Of this total how many were:

	1978	1977	1976
British Columbians	☐	☐	☐
Canadians from outside B.C.	☐	☐	☐
Non-Canadians	☐	☐	☐

5. Approximately how many days will you spend during 1978 actually guiding fishermen?

.... days

hunters (small game)?

.... days

6. What is your regular source of employment when you are not guiding fishermen or hunters of small game?

....

7. In 1978 did you purchase:

A Guide Outfitter's Licence?

☐ Yes ☐ No

An Assistant Guide's Licence?

☐ Yes ☐ No

8. During 1978 what was the average fee that freshwater fishermen paid for your guiding services?

$......... per ☐ day
☐ week

For this fee what services are provided?

....

....

....

What was the average fee that small game hunters paid for your services?

$............ per ☐ day
☐ week

For this fee what services are provided?

....

....

....

The remaining questions deal mainly with the economics of the guiding industry. Your responses are our only source of this information. We emphasize that the confidentiality of individual answers be will respected.

9. What is your total annual income from all sources (before taxes)?

$0-2,999	☐	☐	$15,000-19,999
$3,000-5,999	☐	☐	$20,000-24,999
$6,000-8,999	☐	☐	$25,000-29,999
$9,000-11,999	☐	☐	$30,000-34,999
$12,000-14,999	☐	☐	Over $35,000

10. What proportion of your total annual income comes from guiding fishermen?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

.1. What proportion of your total annual income comes from guiding hunters for small game?

0-20% ☐
21-40% ☐
41-60% ☐
61-80% ☐
81-100% ☐

.2. When guiding for fish and/or small game, do you operate in association with a fish camp, resort or lodge?

☐ Yes ☐ No

If yes, please name the resort or fish camp and indicate the capacity in which you operate (i.e., owner, operator, employee, etc.)

....

....

If no, please describe the nature of your fish and/or small game guiding business in terms of the amount of money you have invested.

Buildings $..........
Boats and motors $..........
Other equipment $..........
Docks, launching ramps, etc. $..........
Roads and trails $..........
Vehicles $..........
Other expenses (Please specify) $..........

....

COMMENTS:

....

....

....

....

....

....

....

....

....

....

....

....

....

Thank you for your cooperation. Please return this questionnaire in the attached self-addressed envelope.

Sportsfish

and

Wildlife

Values

in

British

Columbia

Number of Mailings:

1

Follow-Up:

None

Number of Returns:

Completed Returns	38
Post Office Returns	6
Total	44

Percent Completed:

42.7%

APPENDIX C

GUIDED RESIDENT HUNTERS

The key issue behind much of the conflict between guides and packers centres on the resident hunter. In recent years less than 0.1% of resident hunters (between 80 and 100) hired guides in order to hunt big game. Members of the Resident Wildlife and Tourist Association claim that this small resident market for guiding services is due to very high guiding fees and poorer quality services offered to resident hunters. And, considering that resident hunters have hunt success rates which are much lower than guided non-resident hunters, the Association suggests that resident hunters may not be getting their fair share of the big game harvest under existing wildlife management policies. If this argument is true, a revision of existing wildlife management policies (specifically, the role of the guiding industry) may be necessary.

It is difficult to prove or disprove the claims of the Resident Wildlife and Tourist Association It was beyond the scope of this study to contact resident hunters to see how they felt about the cost of hiring a guide and the resultant services provided. (In order to sample just one percent of resident hunters, some 1,370 questionnaires would have had to be sent out.) Instead, the 80 resident hunters who actually hired a guide in 1977 were contacted and questioned. While this process may appear to present the views of a very small number of resident hunters, it does allow us to compare what residents actually paid to guides with what non-residents paid, rather than compare what residents thought they might have to pay for a guide. An analysis based on actual costs and actual services provided is much more valid than evaluating conjecture about what might have occurred.

1. Hunt Characteristics

Resident hunters using guides experienced a different hunting trip than did non-resident hunters. First, the length of the guided hunt was shorter for resident hunters (an average of 8.7 days compared to 9.3 days for non-resident hunters). Such a guided hunt represented just less than half of the time that the resident hunter spent hunting (17.7 days) during the entire year. One out of four resident hunters fished on their guided hunt, compared to one out of three non-resident hunters. The average time spent fishing was also less - 0.4 days for resident hunters as opposed to 0.9 days for non-resident hunters.

A second difference between resident and non-resident hunting trips relates to the guide services offered. Most non-resident hunters (62%) were accompanied by an Assistant Guide during their hunt. Resident hunters, on the other hand, were usually in the field with a Guide Outfitter. Only 22% of resident hunters reported having hunted only with an Assistant Guide. Based on the relative guiding experience of Guide Outfitters vis-a-vis Assistant Guides, the resident hunter probably had a better guided hunt than his non-resident counterpart.

2. Hunting Preferences and Success Rates

A greater proportion of resident hunters using guides were meat hunters. About 38.7% of resident hunters claimed to be meat hunters (15.0% of non-residents) while 35.5% were after trophy animals (40.3% for non-residents). The remaining 25.8% were hunting for both meat and trophy, compared to 44.7% of non-resident hunters.

As with non-resident hunters, residents felt that moose was the most important big game species. However, residents felt that grizzly bear was a more important species than mountain sheep and elk was just as important as mountain sheep.

Per hunter, residents accompanied by guides harvested more animals than did non-residents. In 1977, residents harvested 1.32 animals apiece, compared to only 0.94 animals per non-resident hunter. Moose represented the greatest proportion of the harvest in both cases.

3. Cost

In 1977, resident hunters reported paying an average of $944 in guide fees and $93 in tips to their guides. This amounts of $1,037 per hunter per trip or about $120 per day. Payments to guides by non-resident hunters varied according to the Resource Management Region in which they hunted and their place of origin. On average, however, non-residents each paid their guide $1,536 or about $165 per day. Thus, guide fees for non-residents were about 37% higher than for residents. By comparison, packers charge approximately $100 per day (excluding tips) for their services. This would suggest that for an extra $20 per day, resident hunters could purchase guiding services as well as packing services.

There are some limits to the extent that this comparison can be made. Some residents reported that they had hunted with the same guide for a number of years and had become close friends. The guide fees paid in these instances are quite low, and would make the average fee paid to guides seem lower than it actually is. On the other hand, some residents reported paying guide fees only in the event of a successful hunt. The extent to which these factors may offset one another is not known. It can generally be assumed however, that resident hunters pay lower guide fees.

To further explore the impact of guide fees on resident hunters, some additional questions were asked. As to whether resident hunters thought that guide fees were excessive, most (76.7%) felt that fees were not too high. Only 20% felt that guide fees were too high. In judging whether resident hunters would be responsive to changes in the cost of hiring a guide, most (77.8%) felt that they would not use a guide any more frequently if guide fees were reduced. Only 22.2% felt that with lower fees they would use a guide more often.

In assessing these responses there are some important factors to consider, the most important of which is the annual income of the resident hunter. Whether the cost of an item is excessive or not depends largely on the amount of money that a potential consumer has available to spend. Resident hunters using guides had incomes in 1977 that were well above the provincial average (see Table C). This would infer that because most resident hunters who used guides were in a higher than average income bracket, they could better afford to hire a guide and would not perceive guide fees to be excessive. It is not known, however, whether there are significant differences between the incomes of resident hunters and the incomes of resident hunters who used guides. If such differences do exist, many resident hunters might indeed consider the cost of a guide to be excessive.

4. Quality of the Hunt

For a hunter to be able to assess the quality of a hunt it is necessary to first establish the reasons why the hunter chose to hire a guide. Although a variety of reasons for choosing a guide were given, three reasons were noted most frequently. Improved access to isolated hunting areas was indicated by nearly half (48.3%) of resident hunters using guides. Improved hunting success rates was a reason why 44.8% of resident hunters chose to hire guides. A few hunters (34.5%) chose to hire guides in order to hunt a particular big game species. Other reasons for hiring guides were given by 27.6% of resident hunters, and included taking non-residents hunting as part of a business trip.

TABLE C

ANNUAL INCOMES OF GUIDED RESIDENT HUNTERS COMPARED TO ANNUAL INCOMES OF BRITISH COLUMBIANS

Annual Income	Resident Hunters Using Guides in 1977	British Columbians Filing Income Tax Returns in 1975*
Under $3,000	3.6%	18.2%
$3,000 - $15,000	17.9%	61.1%
$15,000 - $20,000	17.9%	12.5%
Over $20,000	60.6%	8.2%
	100.0%	100.0%

* *Revenue Canada Taxation, 1977, Taxation Statistics, 1975*.

The majority of hunters (93%) were generally satisfied with their guided hunt. Many felt that the guide services they received were excellent while others commented on the high quality of the guide's facilities. All of those who were dissatisfied felt that their guide lacked the experience to provide adequate services.

Most resident hunters (60%) were planning to hire a guide again at some time in the future. Another 30% were uncertain about their future hunting activities while only 10% definitely did not want to hire a guide again.

To obtain another measure of how residents felt about guided hunting, hunters were asked to compare guided and non-guided hunting in terms of availability of game, hunt quality and hunter success rates. The results of this comparison are presented below:

	Guided Hunting Is:		
	Better	Same	Worse
Availability of Game	86%	14%	0
Quality of the Hunt	79%	21%	0
Hunt Success Rates	86%	14%	0

Overall, guided hunting was felt to be superior to non-guided hunting.

As an alternative to hiring guides, resident hunters were asked if they would ever consider using the services of a packer. One out of every three hunters had used or felt that they might use a packer. Those that had used packers (7.7%) were generally content with the packing services they had received. The majority of hunters (66%) however, would not consider using a packer. Some claimed that packers lacked experience (10%), others (20%) stated that they didn't need packing services in order to hunt in remote areas, and still other hunters (30%) felt that it was unethical to hire a packer rather than a guide for basically the same services. Another portion of hunters (25%) noted that they would not hire packers because packers cannot provide the guiding services that the hunters desired. Thus, the market among resident hunters for packer's services is limited by the services they can provide and by uncertainty about the industry.

5. The Value of Resident Hunting

Although the value of resident hunting activities was not an issue in this study, the questionnaire process provided an opportunity to investigate these values. Other studies have defined these values but the results of these studies are outdated and should be revised regularly if hunter values are to be adequately considered in resource management.

The value of hunting to B.C. residents is usually measured in terms of what they would be prepared to pay for the hunting opportunities they enjoy. The actual cost to hunt is not a good measure of how residents value hunting because the licence costs paid by residents are substantially below non-resident licence costs and are established by government policy rather than a market mechanism that would attempt to equate cost with value. Thus resident hunters enjoy a substantial measure of consumer surplus - the difference between what they would be willing to pay for hunting and their actual costs.

To measure this consumer surplus, resident hunters using guides were asked what they would be willing to pay for a day of big game hunting in British Columbia, over and above their actual expenses. Answers ranged between $20 and $500 per day, although the average value was about $181 per day. The most frequent responses were $100 and $150 per day. It should be added that there was no observed correlation between what a hunter was willing to pay and his annual income.

While this information provides some insight into the average value of a day of hunting, the demand for hunting at a cost of $181 per day is not known. Given the hypothetical situation that actual hunting costs were to rise to the maximum level, hunters indicated that they would hunt between 0 and 40 days per year. On average, each hunter would hunt for 10.0 days per year at this cost. Thus, the maximum an average hunter would pay for a year's hunting would be $1810 ($181 per day X 10.0 days/year). This number then represents the annual measure of consumer surplus that a resident hunter (only those who use guides) enjoys under current licencing structures, existing hunting costs and his present annual income.

APPENDIX D

FEDERAL AND PROVINCIAL TAXES APPLICABLE TO NON RESIDENT HUNTERS' EXPENDITURES

As noted in the text, various federal and provincial taxes serve to redistribute the economic benefits resulting from non-resident hunters' expenditures. Thus, people throughout British Columbia and the rest of Canada actually benefit from non-resident big game hunting. It is possible to determine the extent to which benefits are redistributed by examining the federal and provincial taxes that directly apply. Of course federal and provincial income taxes paid by guides and other business owners providing services to non-resident hunters would also serve to redistribute the benefits of non-resident spending, but the amount of tax directly attributable to non-residents is impossible to assess.

The taxes that we are most interested in examining in this study apply primarily to non-resident expenditures on transportation and other costs. For each of these categories the relevant taxes and rates of tax are summarized below.

EXPENDITURES ON TRANSPORTATION

1. Fares:

Plane fares were most common among non-resident hunters. Although the cost of such fares would include the operating taxes that the carrier has to pay, the proportion of the fare attributable to these taxes is unknown. Air travellers are also required to pay a federal airport tax over and above the cost of the fare. The rate of tax is 8% of the cost of the fare, to a maximum of $8.00.

2. Gas and Oil:

Assuming that a gallon of gasoline cost one dollar, then 21 cents would go to the federal government for federal production taxes, manufacturers sales tax and excise tax, and 20 cents would go to the province for the provincial production tax and road tax.

3. Vehicle Rental:

The general provincial sales tax (5% in 1977) applies to the mileage and time component of a vehicle's rental cost.

4. Vehicle Repair:

The general provincial and federal sales taxes apply to the materials used in vehicle repair. It is likely that half of the repair costs incurred by non-resident hunters were for the materials required for repairs.

OTHER EXPENDITURES

1. Alcoholic Beverages:

The 7% provincial and 12% federal sales taxes on alcoholic beverages apply on purchases of alcoholic beverages.

2. Lodging:

The Provincial Hotel and Motel Room Tax of 5% on expenditures for overnight lodging affects hunters requiring accommodation aside from that provided by the guide.

3. Taxidermy

Hunters pay the general provincial and federal sales taxes on the materials component (about 25%) of their taxidermy bill.

4. Other Items:

Hunters purchased a variety of other items for their hunt, including ammunition, clothing and other equipment. For these types of expenditures the general federal and provincial sales taxes would apply.

Using this information on taxes and making some assumptions as to the proportions of non-resident hunters' expenditures to which these taxes apply, it was possible to estimate the amount of tax paid to the provincial and federal governments in 1977. These estimates are as follows:

	Federal Taxes	Provincial Taxes	Total Taxes
Transportation	$91,120	$61,110	$152,230
Other Expenditures	$56,585	$36,770	$93,355
Total	$147,705	$97,880	$245,585

This amount of tax represents about 11.8% of the total expenditures on transportation and other items, by non-resident hunters in 1977.

80 - 500 - 34

PRINTED BY
Reprographics
MAP PRODUCTION DIVISION